101

# PCOLS

INTERACTIVE TUTORIAL

Roles: A/OPC, A/BO Supervisor, A/BO, and RM

# How to Create a New Cardholder Account in AIM

START

# TUTORIAL ICON LEGEND:

⌂ HOME/BACK: This icon will take you back to the List of Actions or back one action

→ NEXT: This icon will allow you to continue to the next action

↻ REPLAY: This icon will allow you to replay the action

✉ EMAIL: This icon will take you to the email message

↓ SCROLL: This icon will allow you to scroll down

ⓘ INFO: This icon will take you to additional information

● Agency/Organization Program Coordinator (A/OPC): This icon will take you to the specific A/OPC action

● Approving/Billing Officials Supervisor (A/BO Supervisor): This icon will take you to the specific A/BO Supervisor action

● Approving/Billing Official (A/BO): This icon will take you to the specific A/BO action

● Resource Manager and Resource Manager Pool (RM): This icon will take you to the specific RM action

● Cardholder: This icon will take you to the specific Cardholder action

→

The ⓘ button will appear on many screens throughout this tutorial. Click on this button to view additional information.

Click the ✖ button to return to the previous screen.

Clicking on an area highlighted by a red box will advance the tutorial to the next step.

→

# Index of Actions:

**A/OPC Action 1:**
**AIM: Initiate Request for New Cardholder Account**

**A/BO Action 1:**
**AIM: Verify and Approve the New Cardholder Account Request**

**Cardholder Action 1:**
**AIM: Complete Cardholder Nomination**

**A/BO Supervisor Action 1:**
**AIM: Verify and Approve the New Cardholder Account Request**

**RM Action 1:**
**AIM: Verify Financial Information is Correct**

**A/OPC Action 2:**
**AIM: Verify Cardholder Account Information is Correct**

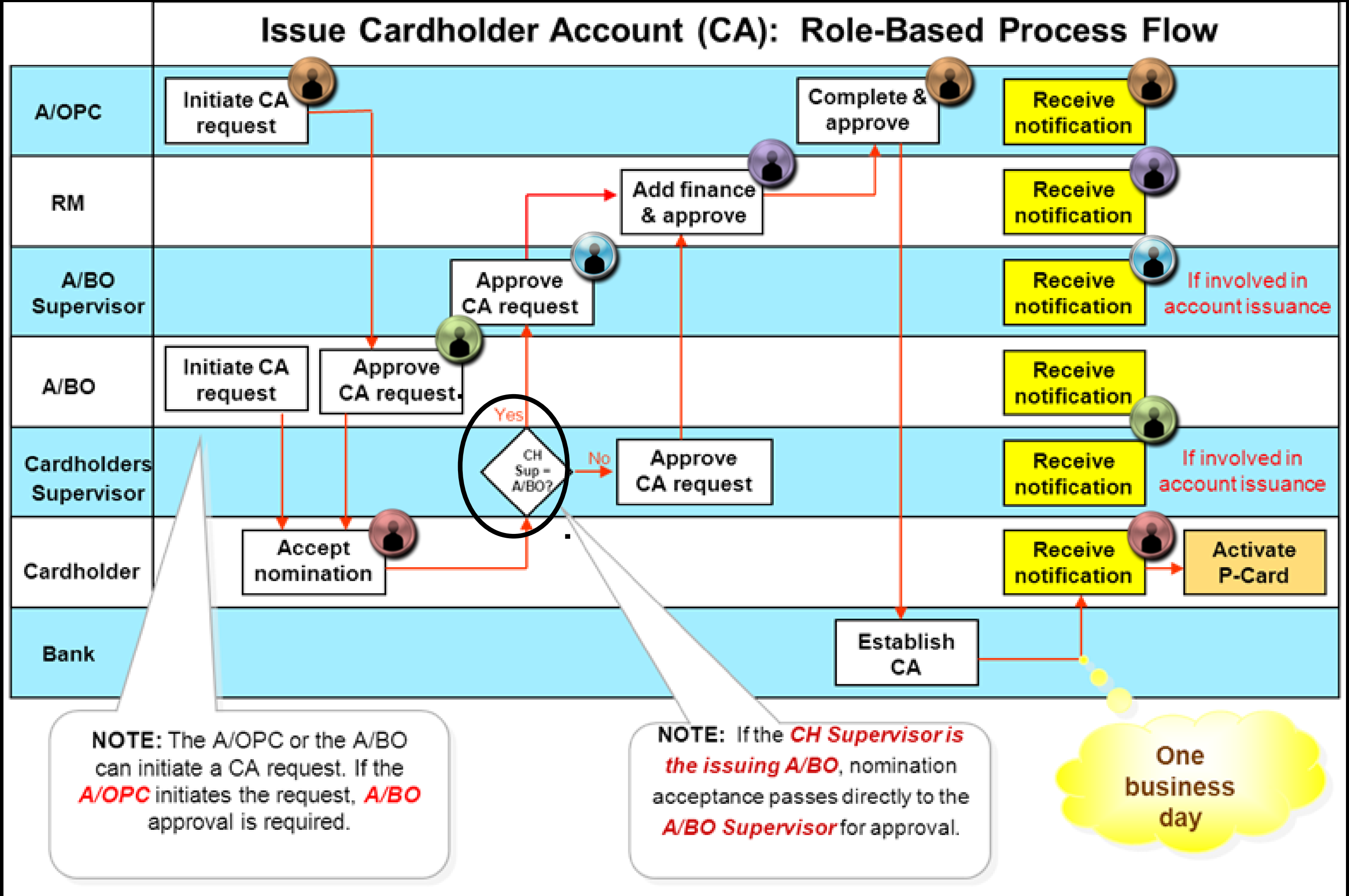
To go through all of the tasks in the recommended order, use the ➔ icon.

To go to a specific action use one of the ● ● ● ● icons next to the action to be redirected to that section of the tutorial. Click the “X” to return to the previous screen.

**Scenario:** The A/OPC would like to establish a new Cardholder Account for organization 110FW. This new account will be associated with Managing Account *6732. The Cardholder's Supervisor that will be assigned to this new account has been provisioned in EMMA under the 110FW organization. The Cardholders Supervisor and A/BO will be the same individual.

The following interactive tutorial will allow you to see how all the users are involved to complete the set up of a new Cardholder Account in AIM.

# The swim lane diagram shown below outlines the steps this tutorial will cover to complete the workflow for a new Cardholder Account in AIM.


Issue Cardholder Account (CA): Role-Based Process Flow

A/OPC
RM
A/BO Supervisor
A/BO
Cardholders Supervisor
Cardholder
Bank
Initiate CA request
Complete & approve
Receive notification
Add finance & approve
Receive notification
Approve CA request
Receive notification
If involved in account issuance
Initiate CA request
Approve CA request
Receive notification
Yes
CH Sup = A/BO?
No
Approve CA request
Receive notification
If involved in account issuance
Accept nomination
Receive notification
Activate P-Card
Establish CA
One business day

**NOTE:** The A/OPC or the A/BO can initiate a CA request. If the *A/OPC* initiates the request, *A/BO* approval is required.

**NOTE:** If the ***CH Supervisor* is *the issuing A/BO***, nomination acceptance passes directly to the ***A/BO Supervisor*** for approval.

# A/OPC Action 1

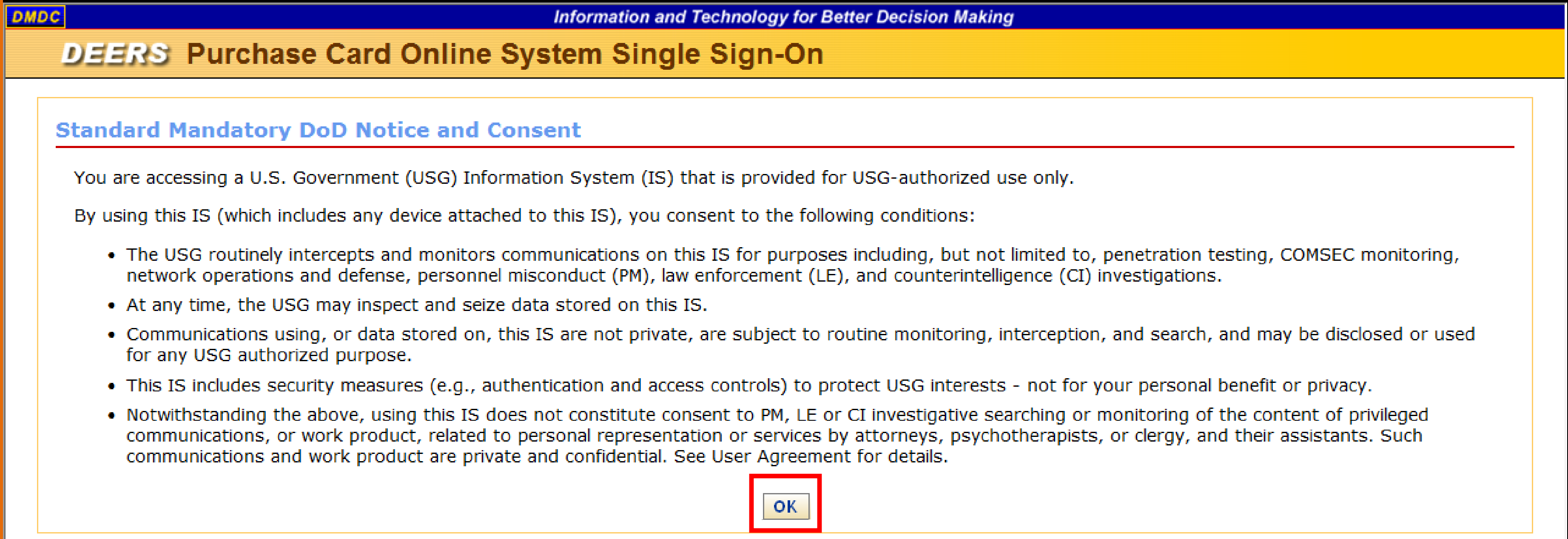
# AIM: Initiate Request for New Cardholder Account

## A/OPC Action 1 AIM: Initiate Request for New Cardholder Account

Go to the PCOLS-Web:

https://pki.dmdc.osd.mil/appj/pcols-web/

# Click the “OK” button.


DMDC
Information and Technology for Better Decision Making
DEERS Purchase Card Online System Single Sign-On
OK

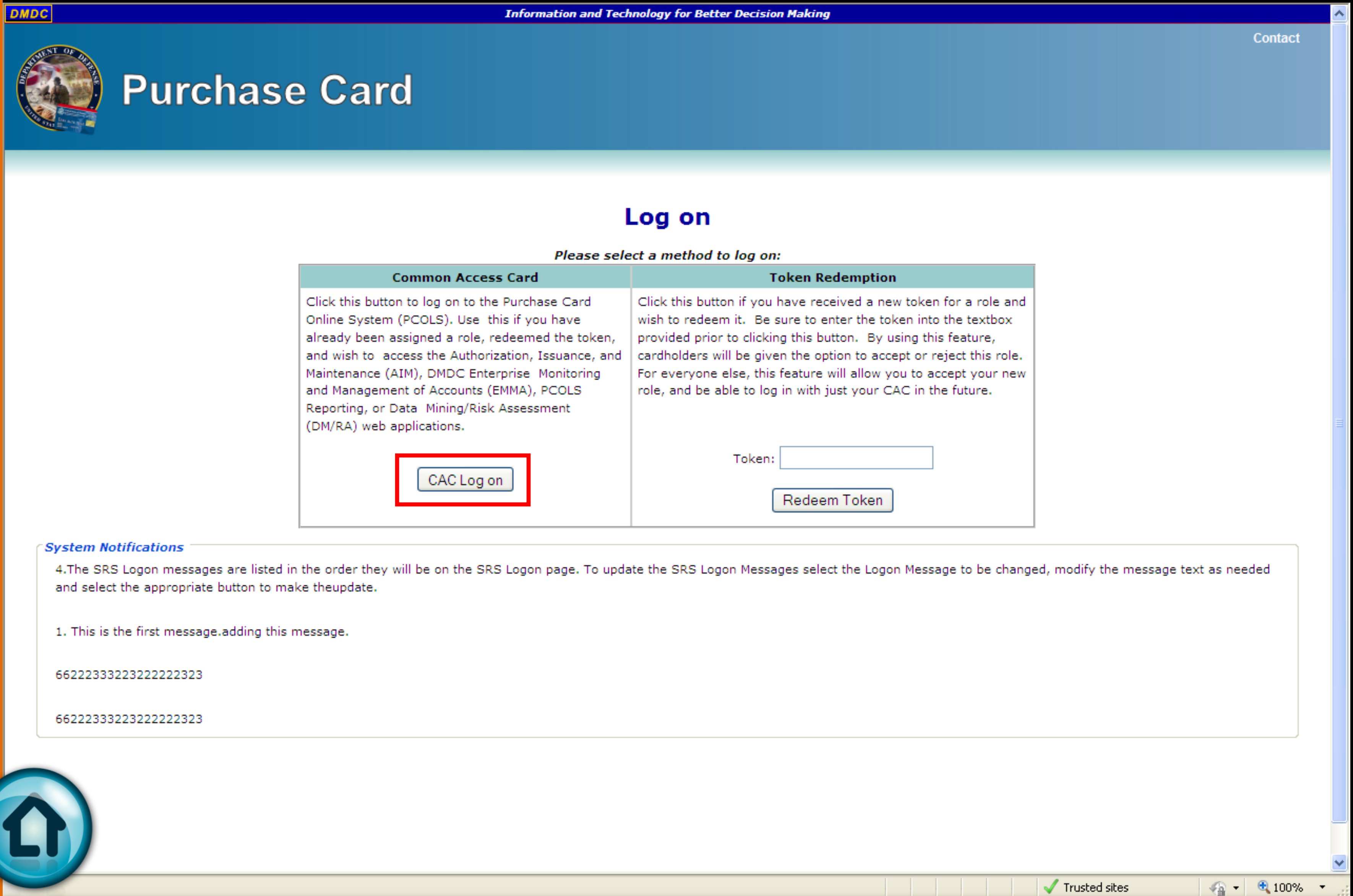
**Standard Mandatory DoD Notice and Consent**

You are accessing a U.S. Government (USG) Information System (IS) that is provided for USG-authorized use only.

By using this IS (which includes any device attached to this IS), you consent to the following conditions:

- The USG routinely intercepts and monitors communications on this IS for purposes including, but not limited to, penetration testing, COMSEC monitoring, network operations and defense, personnel misconduct (PM), law enforcement (LE), and counterintelligence (CI) investigations.
- At any time, the USG may inspect and seize data stored on this IS.
- Communications using, or data stored on, this IS are not private, are subject to routine monitoring, interception, and search, and may be disclosed or used for any USG authorized purpose.
- This IS includes security measures (e.g., authentication and access controls) to protect USG interests - not for your personal benefit or privacy.
- Notwithstanding the above, using this IS does not constitute consent to PM, LE or CI investigative searching or monitoring of the content of privileged communications, or work product, related to personal representation or services by attorneys, psychotherapists, or clergy, and their assistants. Such communications and work product are private and confidential. See User Agreement for details.

# Click the “CAC Log on” button.



## Log on

*Please select a method to log on:*

| Common Access Card | Token Redemption |
|---|---|
| Click this button to log on to the Purchase Card Online System (PCOLS). Use this if you have already been assigned a role, redeemed the token, and wish to access the Authorization, Issuance, and Maintenance (AIM), DMDC Enterprise Monitoring and Management of Accounts (EMMA), PCOLS Reporting, or Data Mining/Risk Assessment (DM/RA) web applications. | Click this button if you have received a new token for a role and wish to redeem it. Be sure to enter the token into the textbox provided prior to clicking this button. By using this feature, cardholders will be given the option to accept or reject this role. For everyone else, this feature will allow you to accept your new role, and be able to log in with just your CAC in the future. |
| CAC Log on | Token: ____<br>Redeem Token |

***System Notifications***

4.The SRS Logon messages are listed in the order they will be on the SRS Logon page. To update the SRS Logon Messages select the Logon Message to be changed, modify the message text as needed and select the appropriate button to make theupdate.

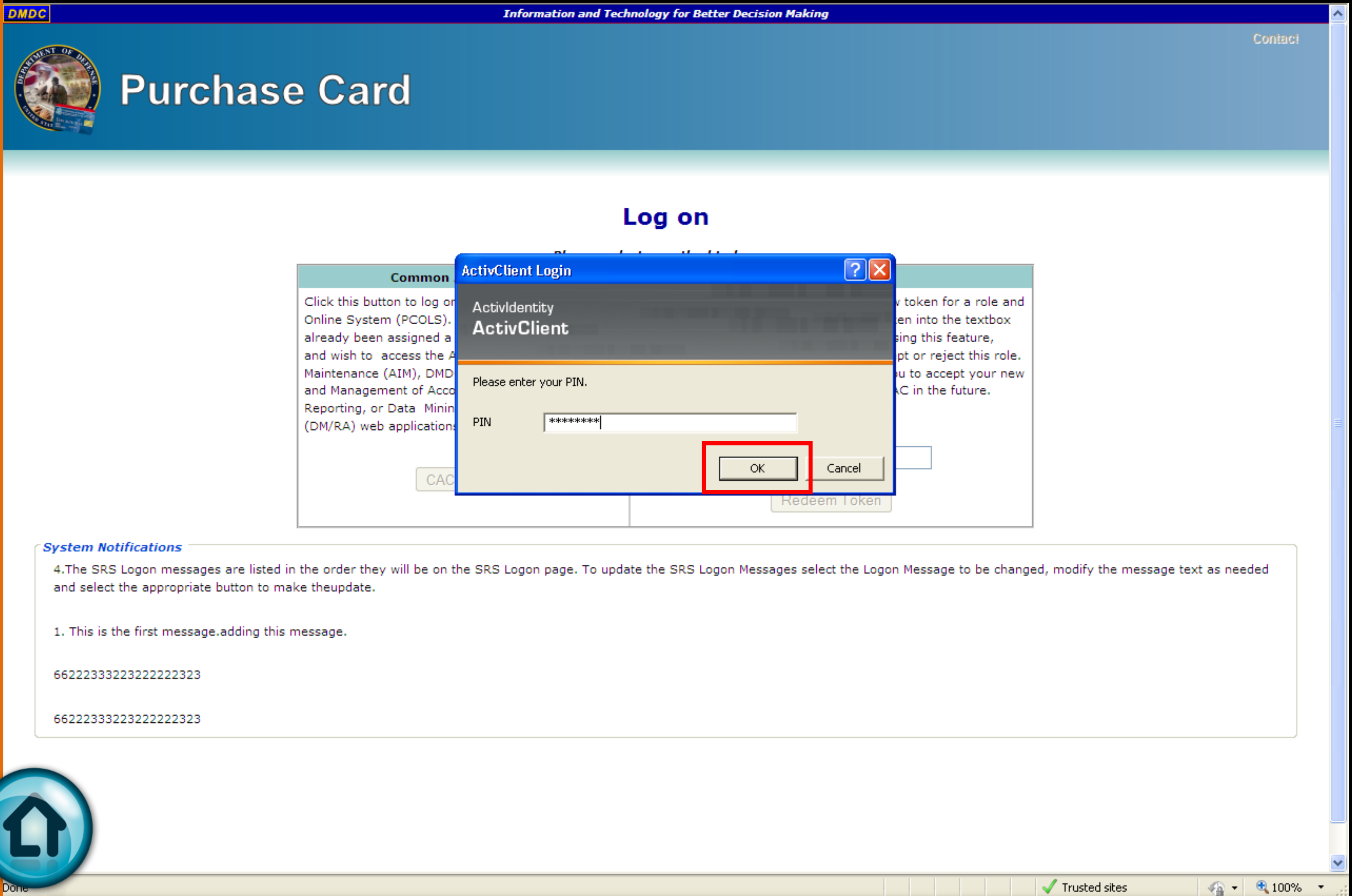
1. This is the first message.adding this message.

66222333223222222323

66222333223222222323

A/OPC Action 1 AIM: Initiate Request for New Cardholder Account

# The A/OPC enters their PIN. Click the “OK” button.


DMDC
Information and Technology for Better Decision Making
Contact
Purchase Card
Log on
Common
CAC
Redeem Token
ActivClient Login
ActivIdentity
ActivClient
OK
Cancel
Done
Trusted sites
100%

Please enter your PIN.

PIN ********

Click this button to log on … Online System (PCOLS). … already been assigned a … and wish to access the A… Maintenance (AIM), DMD… and Management of Acco… Reporting, or Data Minin… (DM/RA) web applications

… token for a role and … en into the textbox … ing this feature, … pt or reject this role. … u to accept your new … C in the future.

*System Notifications*

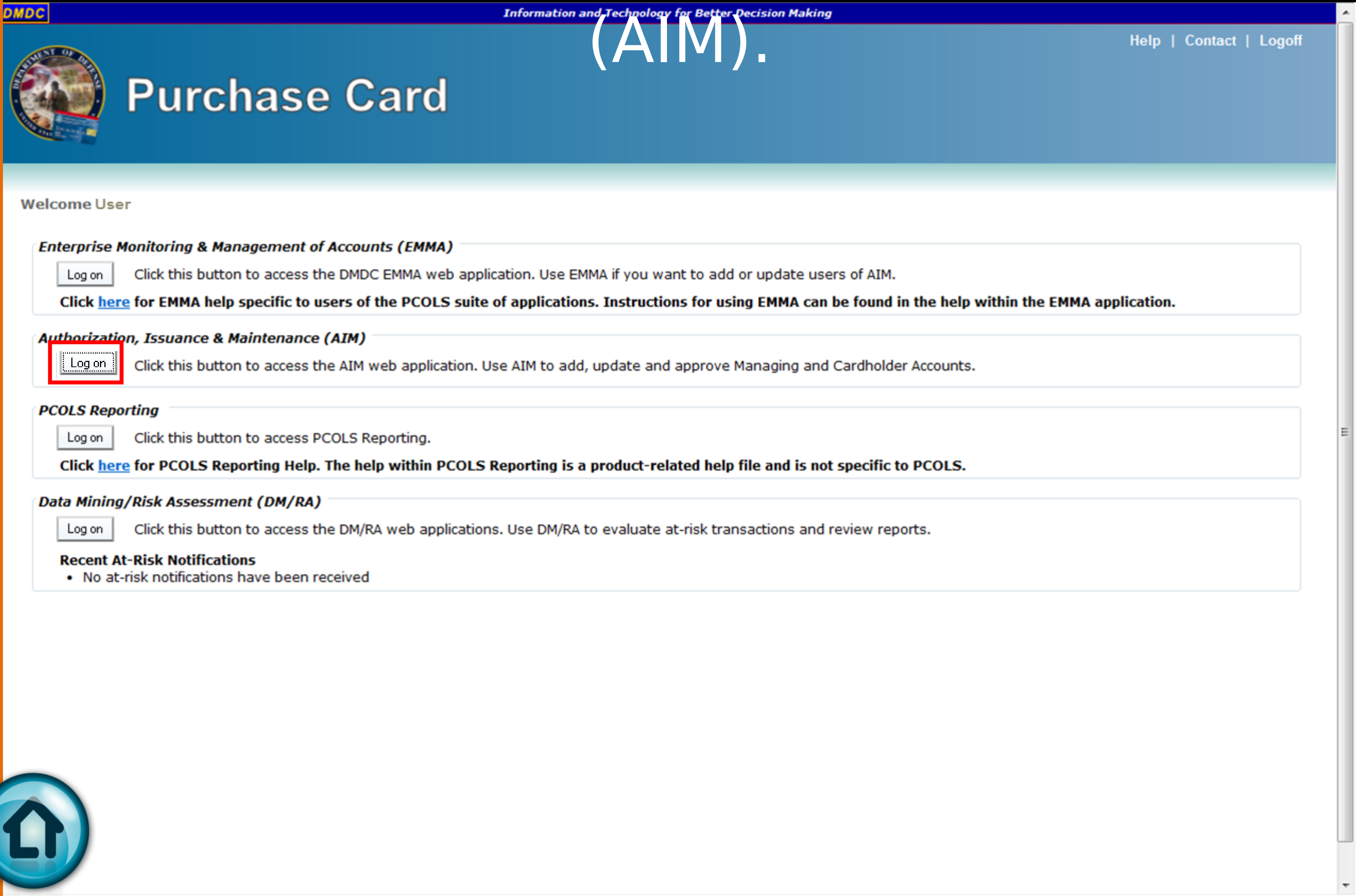
4.The SRS Logon messages are listed in the order they will be on the SRS Logon page. To update the SRS Logon Messages select the Logon Message to be changed, modify the message text as needed and select the appropriate button to make theupdate.

1. This is the first message.adding this message.

66222333223222222323

66222333223222222323

# Click on the “Log on” button for Authorization, Issuance & Maintenance (AIM).



Welcome User

**Enterprise Monitoring & Management of Accounts (EMMA)**

Log on — Click this button to access the DMDC EMMA web application. Use EMMA if you want to add or update users of AIM.

**Click here for EMMA help specific to users of the PCOLS suite of applications. Instructions for using EMMA can be found in the help within the EMMA application.**

**Authorization, Issuance & Maintenance (AIM)**

Log on — Click this button to access the AIM web application. Use AIM to add, update and approve Managing and Cardholder Accounts.

**PCOLS Reporting**

Log on — Click this button to access PCOLS Reporting.

**Click here for PCOLS Reporting Help. The help within PCOLS Reporting is a product-related help file and is not specific to PCOLS.**

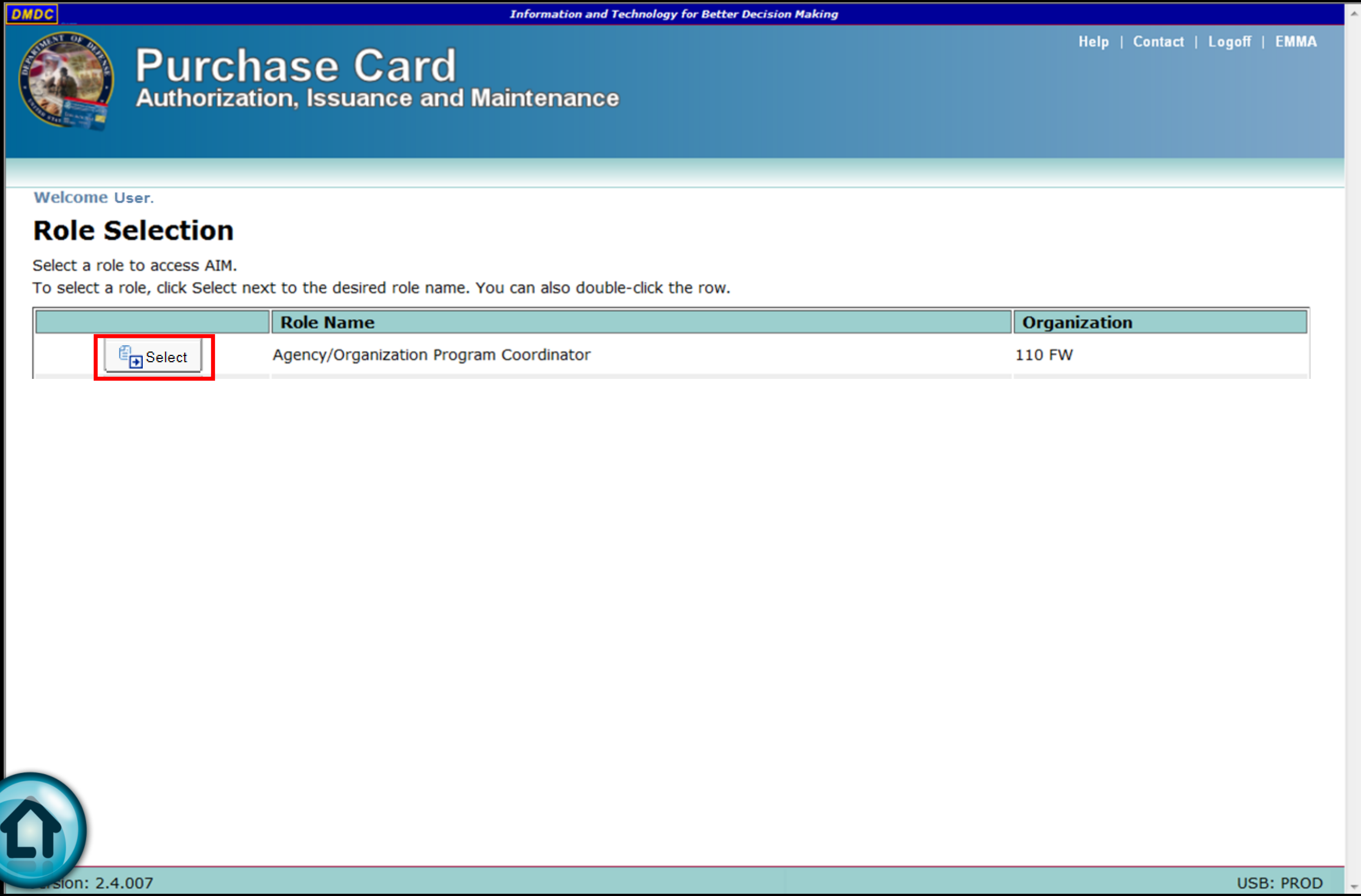
**Data Mining/Risk Assessment (DM/RA)**

Log on — Click this button to access the DM/RA web applications. Use DM/RA to evaluate at-risk transactions and review reports.

**Recent At-Risk Notifications**

- No at-risk notifications have been received

# Click on the A/OPC role for organization 110 FW.



DMDC
Information and Technology for Better Decision Making
Help | Contact | Logoff | EMMA
Purchase Card
Authorization, Issuance and Maintenance

Welcome User.

## Role Selection

Select a role to access AIM.

To select a role, click Select next to the desired role name. You can also double-click the row.

| | Role Name | Organization |
|---|---|---|
| Select | Agency/Organization Program Coordinator | 110 FW |

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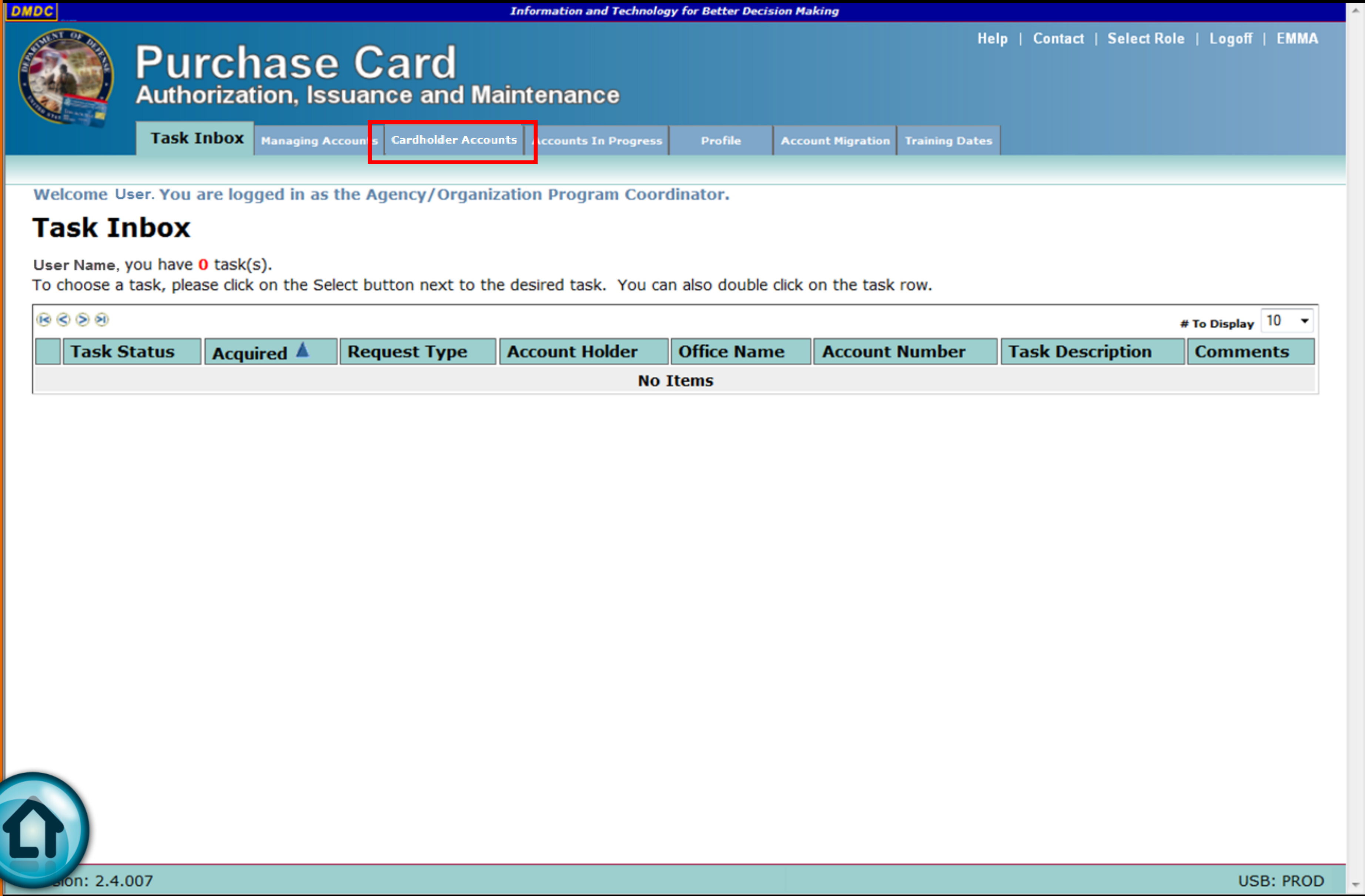
USB: PROD

# Click on the “Cardholder Accounts” tab.

A/OPC Action 1 AIM: Initiate Request for New Cardholder Account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Help | Contact | Select Role | Logoff | EMMA
Purchase Card
Authorization, Issuance and Maintenance
Task Inbox
Managing Accounts
Cardholder Accounts
Accounts In Progress
Profile
Account Migration
Training Dates
# To Display 10

Welcome User. You are logged in as the Agency/Organization Program Coordinator.

## Task Inbox

User Name, you have 0 task(s).
To choose a task, please click on the Select button next to the desired task. You can also double click on the task row.

| | Task Status | Acquired | Request Type | Account Holder | Office Name | Account Number | Task Description | Comments |
|---|---|---|---|---|---|---|---|---|
| | | | | No Items | | | | |

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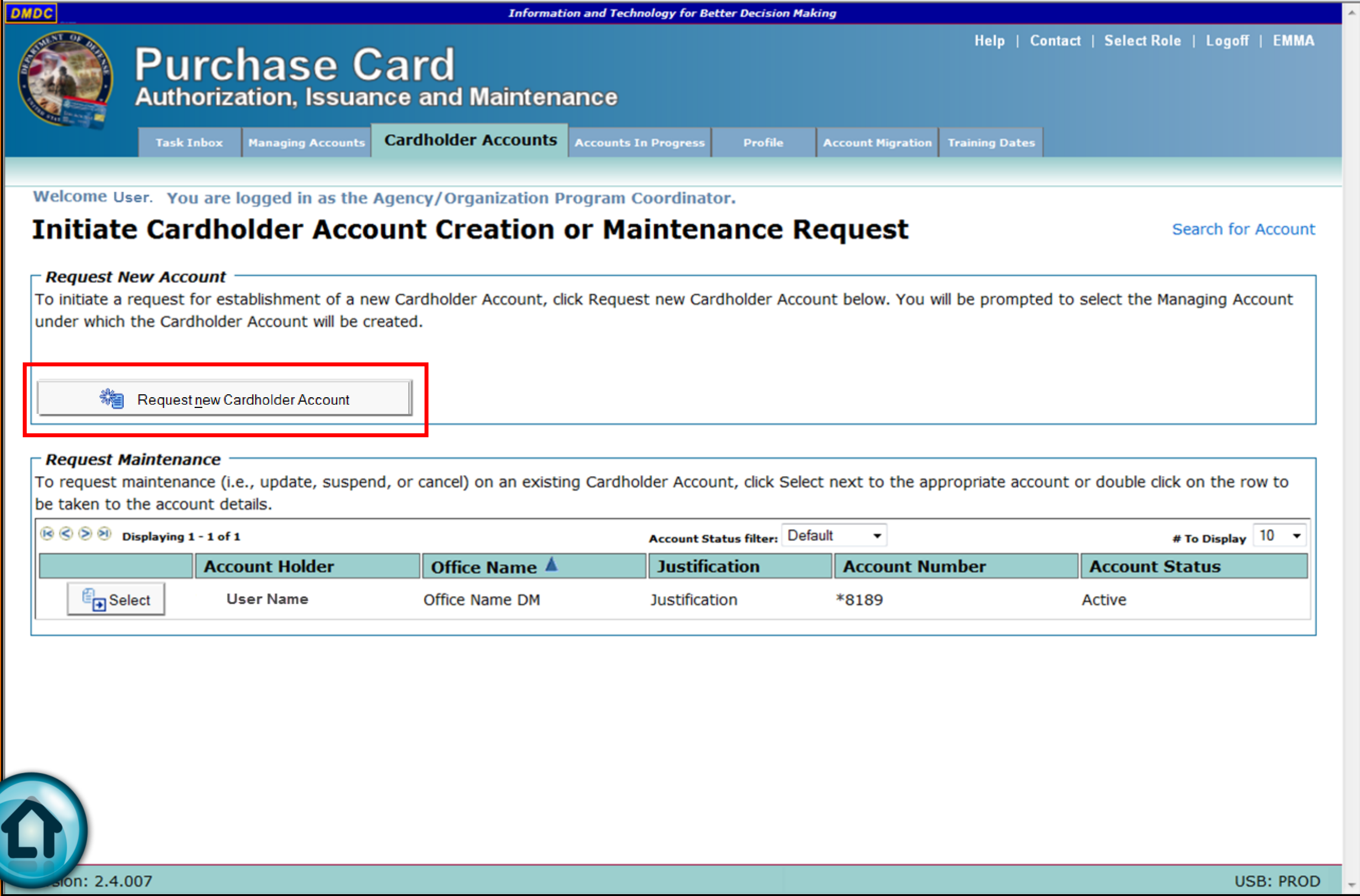
USB: PROD

# Click on the “Request new Cardholder Account” button.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Help | Contact | Select Role | Logoff | EMMA
Purchase Card
Authorization, Issuance and Maintenance
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Welcome User. You are logged in as the Agency/Organization Program Coordinator.

**Initiate Cardholder Account Creation or Maintenance Request**

Search for Account

***Request New Account***

To initiate a request for establishment of a new Cardholder Account, click Request new Cardholder Account below. You will be prompted to select the Managing Account under which the Cardholder Account will be created.

Request new Cardholder Account

***Request Maintenance***

To request maintenance (i.e., update, suspend, or cancel) on an existing Cardholder Account, click Select next to the appropriate account or double click on the row to be taken to the account details.

Displaying 1 - 1 of 1 · Account Status filter: Default · # To Display 10

| | Account Holder | Office Name | Justification | Account Number | Account Status |
|---|---|---|---|---|---|
| Select | User Name | Office Name DM | Justification | *8189 | Active |

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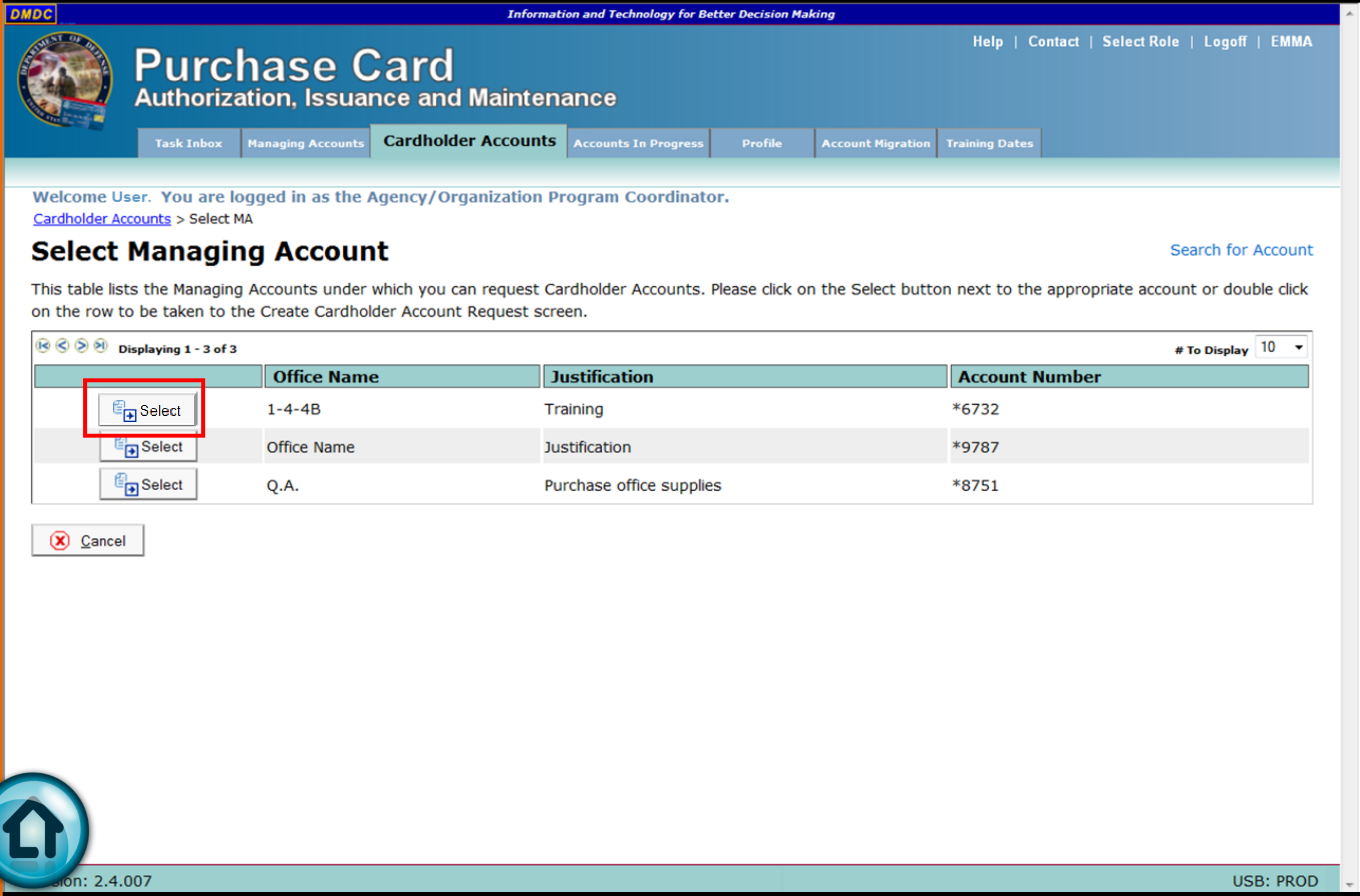
# Click on the “Select” button for Managing Account *6732.

A/OPC Action 1 AIM: Initiate Request for New Cardholder Account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Welcome User. You are logged in as the Agency/Organization Program Coordinator.

Cardholder Accounts > Select MA

**Select Managing Account**

Search for Account

This table lists the Managing Accounts under which you can request Cardholder Accounts. Please click on the Select button next to the appropriate account or double click on the row to be taken to the Create Cardholder Account Request screen.

Displaying 1 - 3 of 3

# To Display 10

| | Office Name | Justification | Account Number |
|---|---|---|---|
| Select | 1-4-4B | Training | *6732 |
| Select | Office Name | Justification | *9787 |
| Select | Q.A. | Purchase office supplies | *8751 |

Cancel

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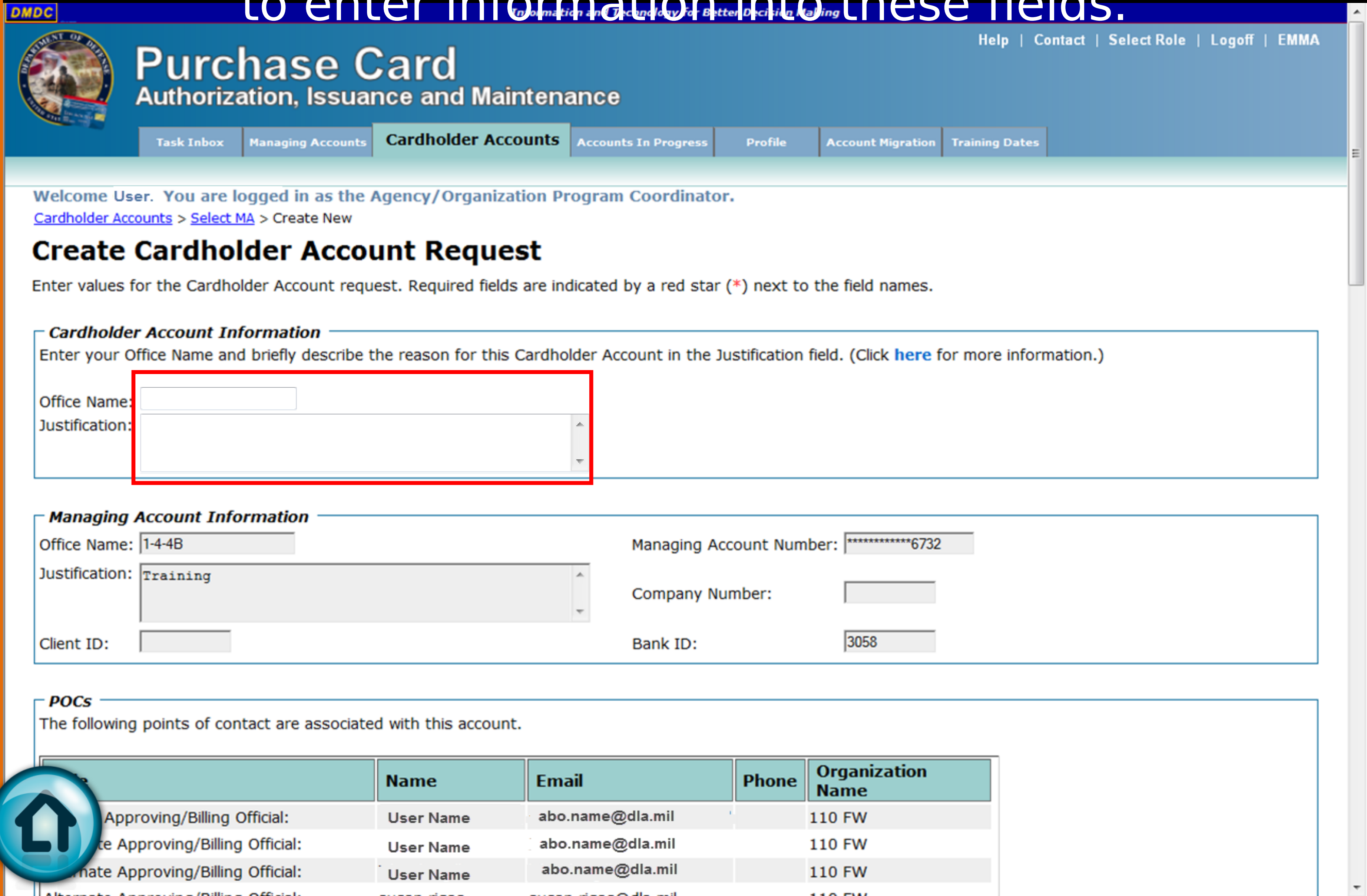
## A/OPC Action 1 AIM: Initiate Request for New Cardholder Account

The A/OPC has the option to enter the Office Name and Justification. Note that only fields with "*" are required. Click on the area under Cardholder Account Information to enter information into these fields.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Help | Contact | Select Role | Logoff | EMMA
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Welcome User. You are logged in as the Agency/Organization Program Coordinator.

Cardholder Accounts > Select MA > Create New

### Create Cardholder Account Request

Enter values for the Cardholder Account request. Required fields are indicated by a red star (*) next to the field names.

**Cardholder Account Information**

Enter your Office Name and briefly describe the reason for this Cardholder Account in the Justification field. (Click here for more information.)

Office Name:
Justification:

**Managing Account Information**

Office Name: 1-4-4B
Justification: Training
Client ID:
Managing Account Number: ************6732
Company Number:
Bank ID: 3058

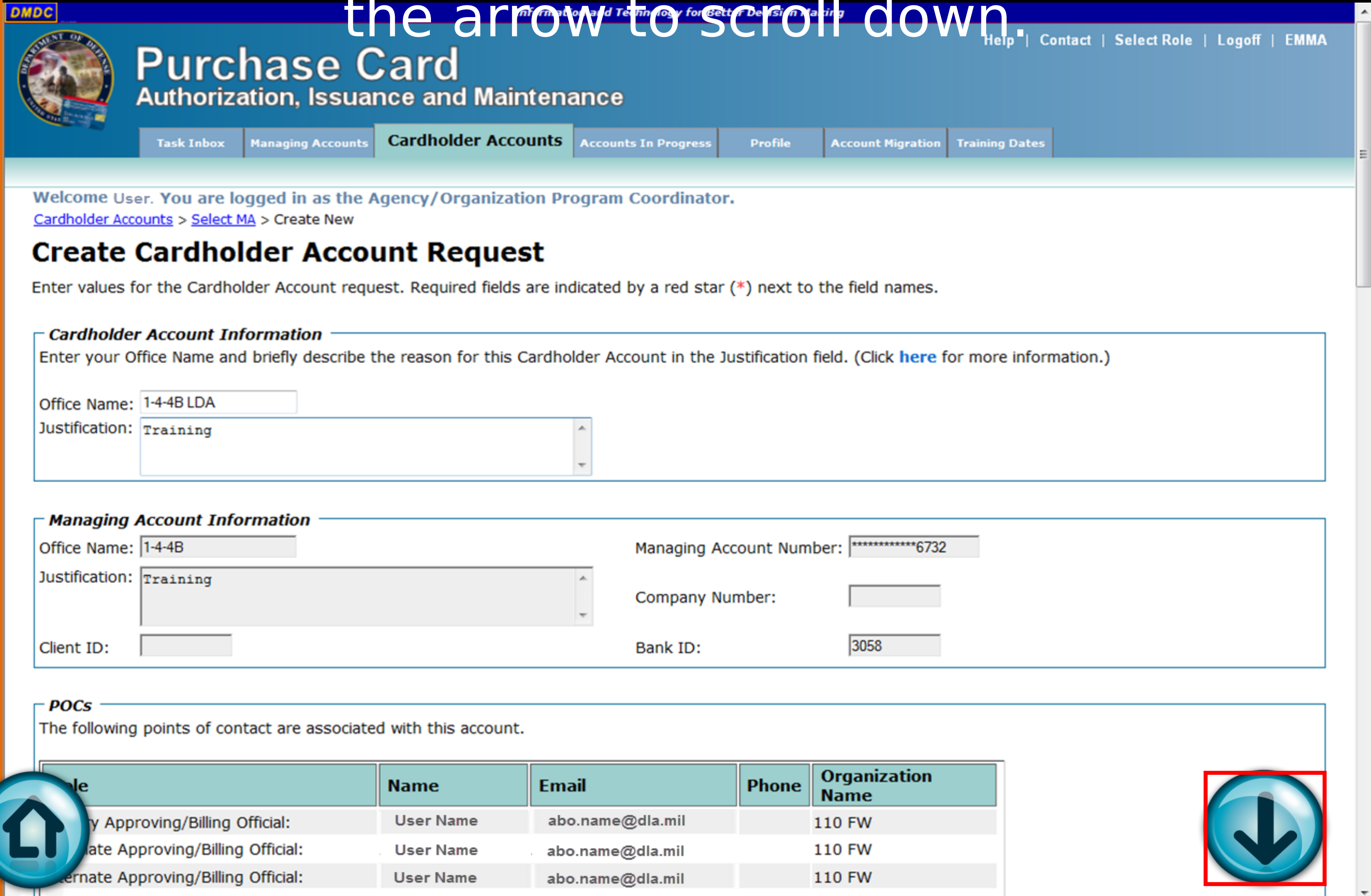
**POCs**

The following points of contact are associated with this account.

| …e | Name | Email | Phone | Organization Name |
|---|---|---|---|---|
| Approving/Billing Official: | User Name | abo.name@dla.mil | | 110 FW |
| …te Approving/Billing Official: | User Name | abo.name@dla.mil | | 110 FW |
| …nate Approving/Billing Official: | User Name | abo.name@dla.mil | | 110 FW |

## A/OPC Action 1 AIM: Initiate Request for New Cardholder Account

The A/OPC has entered the **Office Name** and **Justification** for the new cardholder account. Fields marked with an (*) are required. Click on the arrow to scroll down.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Help | Contact | Select Role | Logoff | EMMA
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Welcome User. You are logged in as the Agency/Organization Program Coordinator.

Cardholder Accounts > Select MA > Create New

### Create Cardholder Account Request

Enter values for the Cardholder Account request. Required fields are indicated by a red star (*) next to the field names.

***Cardholder Account Information***

Enter your Office Name and briefly describe the reason for this Cardholder Account in the Justification field. (Click **here** for more information.)

Office Name: 1-4-4B LDA

Justification: Training

***Managing Account Information***

Office Name: 1-4-4B

Justification: Training

Client ID:

Managing Account Number: ************6732

Company Number:

Bank ID: 3058

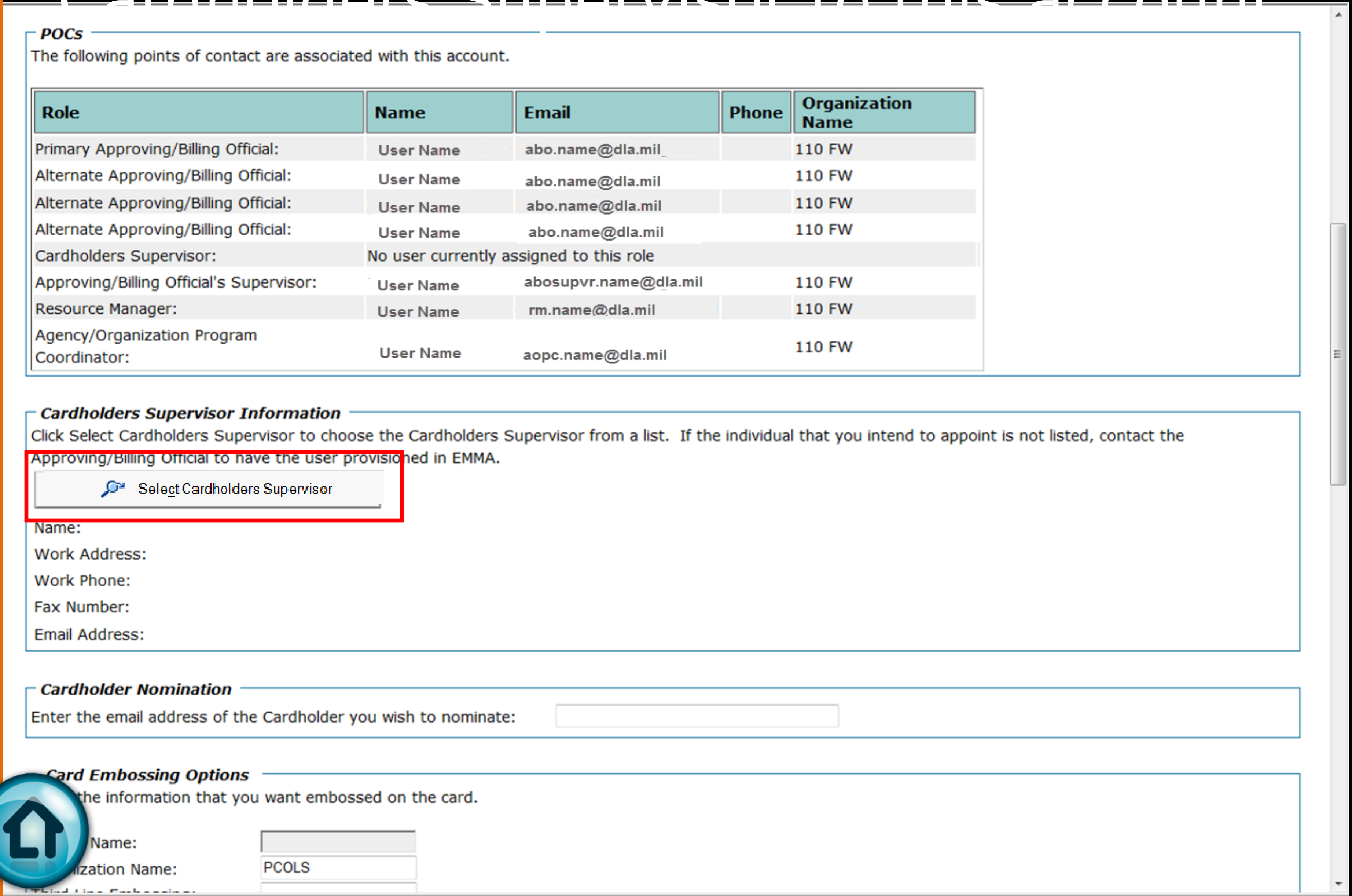
***POCs***

The following points of contact are associated with this account.

| le | Name | Email | Phone | Organization Name |
|---|---|---|---|---|
| y Approving/Billing Official: | User Name | abo.name@dla.mil | | 110 FW |
| ate Approving/Billing Official: | User Name | abo.name@dla.mil | | 110 FW |
| ernate Approving/Billing Official: | User Name | abo.name@dla.mil | | 110 FW |

A/OPC Action 1 AIM: Initiate Request for New Cardholder Account

# Click on the "Select Cardholders Supervisor" button to assign a Cardholders Supervisor to this account



***POCs***

The following points of contact are associated with this account.

| Role | Name | Email | Phone | Organization Name |
|---|---|---|---|---|
| Primary Approving/Billing Official: | User Name | abo.name@dla.mil_ | | 110 FW |
| Alternate Approving/Billing Official: | User Name | abo.name@dla.mil | | 110 FW |
| Alternate Approving/Billing Official: | User Name | abo.name@dla.mil | | 110 FW |
| Alternate Approving/Billing Official: | User Name | abo.name@dla.mil | | 110 FW |
| Cardholders Supervisor: | No user currently assigned to this role | | | |
| Approving/Billing Official's Supervisor: | User Name | abosupvr.name@dla.mil | | 110 FW |
| Resource Manager: | User Name | rm.name@dla.mil | | 110 FW |
| Agency/Organization Program Coordinator: | User Name | aopc.name@dla.mil | | 110 FW |

***Cardholders Supervisor Information***

Click Select Cardholders Supervisor to choose the Cardholders Supervisor from a list. If the individual that you intend to appoint is not listed, contact the Approving/Billing Official to have the user provisioned in EMMA.

Name:

Work Address:

Work Phone:

Fax Number:

Email Address:

***Cardholder Nomination***

Enter the email address of the Cardholder you wish to nominate:

***Card Embossing Options***

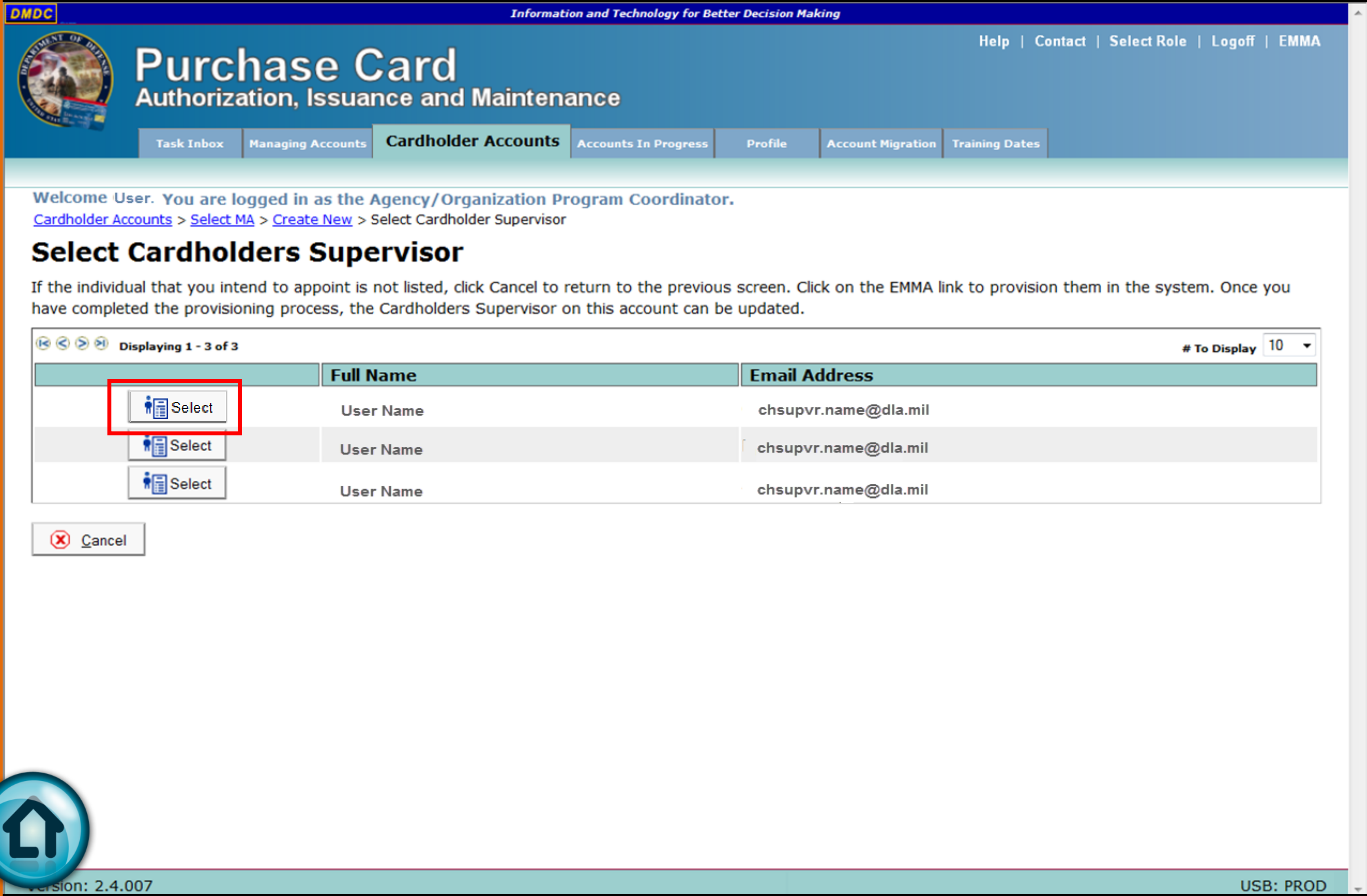
the information that you want embossed on the card.

Name:

ization Name: PCOLS

# Click on the “Select” button to assign a Cardholders Supervisor to this account.

A/OPC Action 1 AIM: Initiate Request for New Cardholder Account



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Welcome User. You are logged in as the Agency/Organization Program Coordinator.

Cardholder Accounts > Select MA > Create New > Select Cardholder Supervisor

## Select Cardholders Supervisor

If the individual that you intend to appoint is not listed, click Cancel to return to the previous screen. Click on the EMMA link to provision them in the system. Once you have completed the provisioning process, the Cardholders Supervisor on this account can be updated.

Displaying 1 - 3 of 3

# To Display 10

| | Full Name | Email Address |
|---|---|---|
| Select | User Name | chsupvr.name@dla.mil |
| Select | User Name | chsupvr.name@dla.mil |
| Select | User Name | chsupvr.name@dla.mil |

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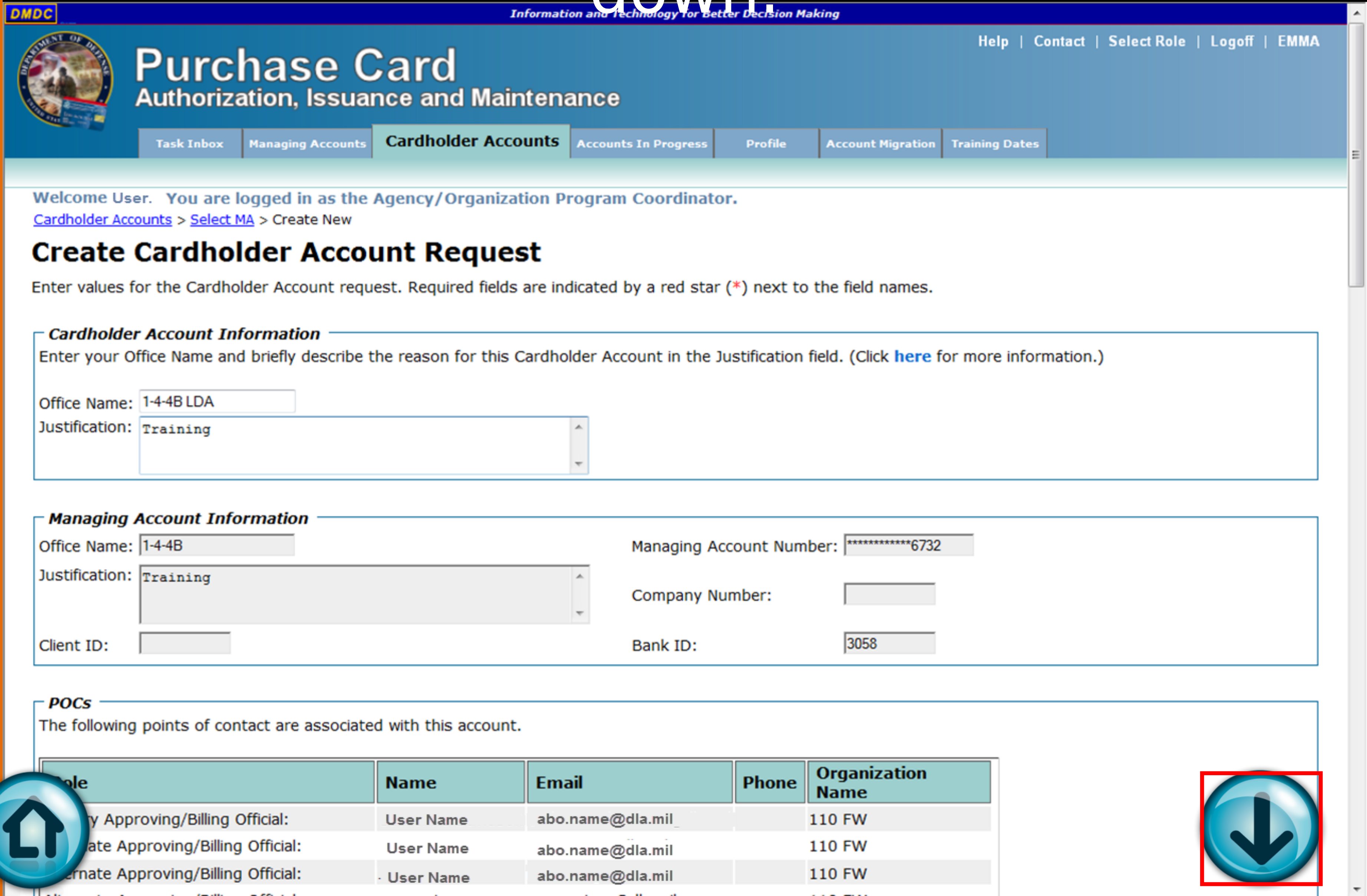
USB: PROD

# The Cardholders Supervisor has now been assigned. Click the arrow to scroll down.

A/OPC Action 1 AIM: Initiate Request for New Cardholder Account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Welcome User. You are logged in as the Agency/Organization Program Coordinator.

Cardholder Accounts > Select MA > Create New

### Create Cardholder Account Request

Enter values for the Cardholder Account request. Required fields are indicated by a red star (*) next to the field names.

**Cardholder Account Information**

Enter your Office Name and briefly describe the reason for this Cardholder Account in the Justification field. (Click **here** for more information.)

Office Name: 1-4-4B LDA

Justification: Training

**Managing Account Information**

Office Name: 1-4-4B

Justification: Training

Client ID:

Managing Account Number: ************6732

Company Number:

Bank ID: 3058

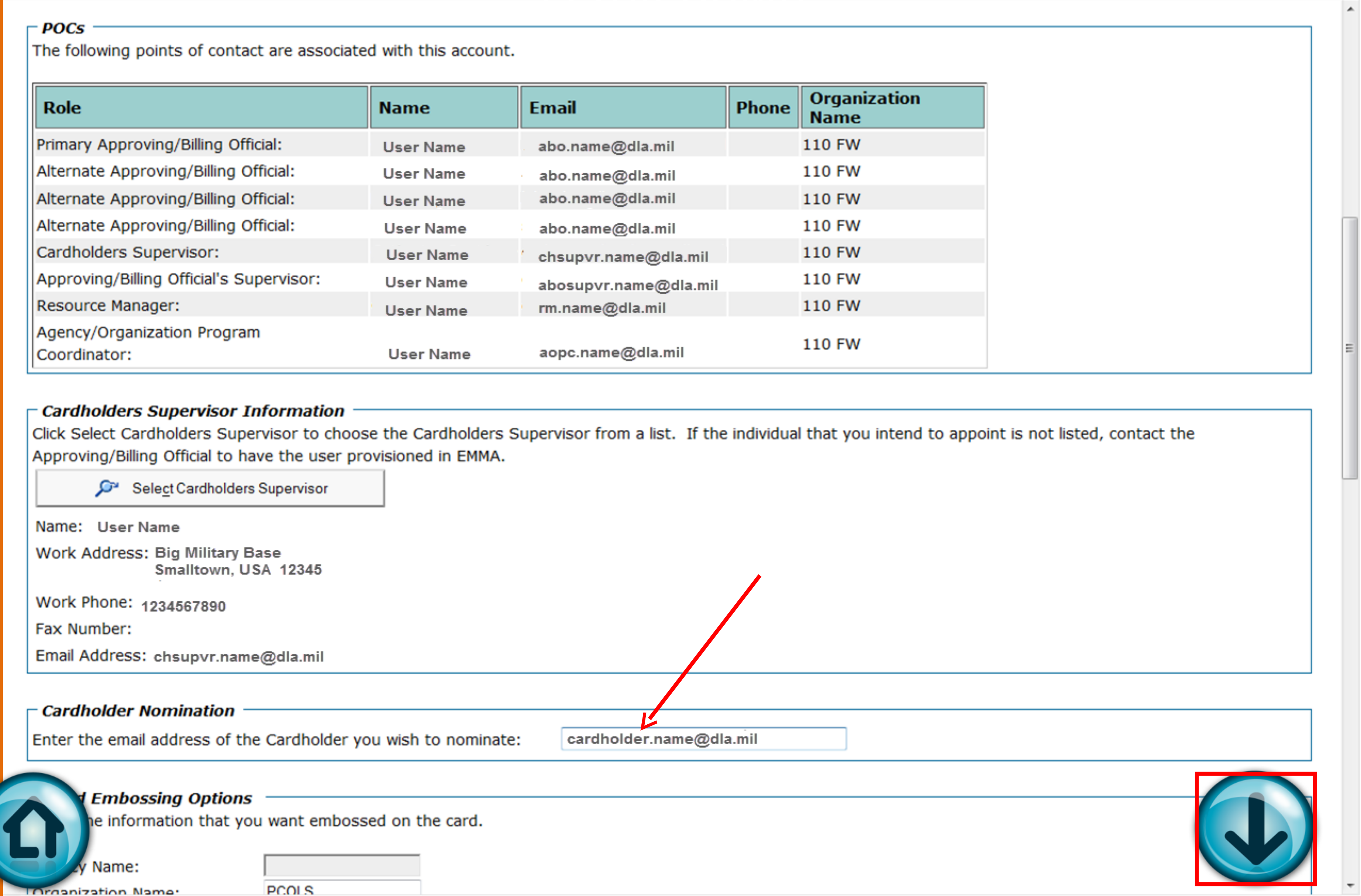
**POCs**

The following points of contact are associated with this account.

| ole | Name | Email | Phone | Organization Name |
|---|---|---|---|---|
| y Approving/Billing Official: | User Name | abo.name@dla.mil | | 110 FW |
| ate Approving/Billing Official: | User Name | abo.name@dla.mil | | 110 FW |
| rnate Approving/Billing Official: | User Name | abo.name@dla.mil | | 110 FW |

## A/OPC Action 1 AIM: Initiate Request for New Cardholder Account

# The Cardholders Supervisor is now in the list of POCs for this account. The A/OPC has entered the **Cardholder's email address**. Click the arrow to scroll down.



***POCs***

The following points of contact are associated with this account.

| Role | Name | Email | Phone | Organization Name |
|---|---|---|---|---|
| Primary Approving/Billing Official: | User Name | abo.name@dla.mil | | 110 FW |
| Alternate Approving/Billing Official: | User Name | abo.name@dla.mil | | 110 FW |
| Alternate Approving/Billing Official: | User Name | abo.name@dla.mil | | 110 FW |
| Alternate Approving/Billing Official: | User Name | abo.name@dla.mil | | 110 FW |
| Cardholders Supervisor: | User Name | chsupvr.name@dla.mil | | 110 FW |
| Approving/Billing Official's Supervisor: | User Name | abosupvr.name@dla.mil | | 110 FW |
| Resource Manager: | User Name | rm.name@dla.mil | | 110 FW |
| Agency/Organization Program Coordinator: | User Name | aopc.name@dla.mil | | 110 FW |

***Cardholders Supervisor Information***

Click Select Cardholders Supervisor to choose the Cardholders Supervisor from a list. If the individual that you intend to appoint is not listed, contact the Approving/Billing Official to have the user provisioned in EMMA.

Name: User Name

Work Address: Big Military Base
Smalltown, USA 12345

Work Phone: 1234567890

Fax Number:

Email Address: chsupvr.name@dla.mil

***Cardholder Nomination***

Enter the email address of the Cardholder you wish to nominate: cardholder.name@dla.mil

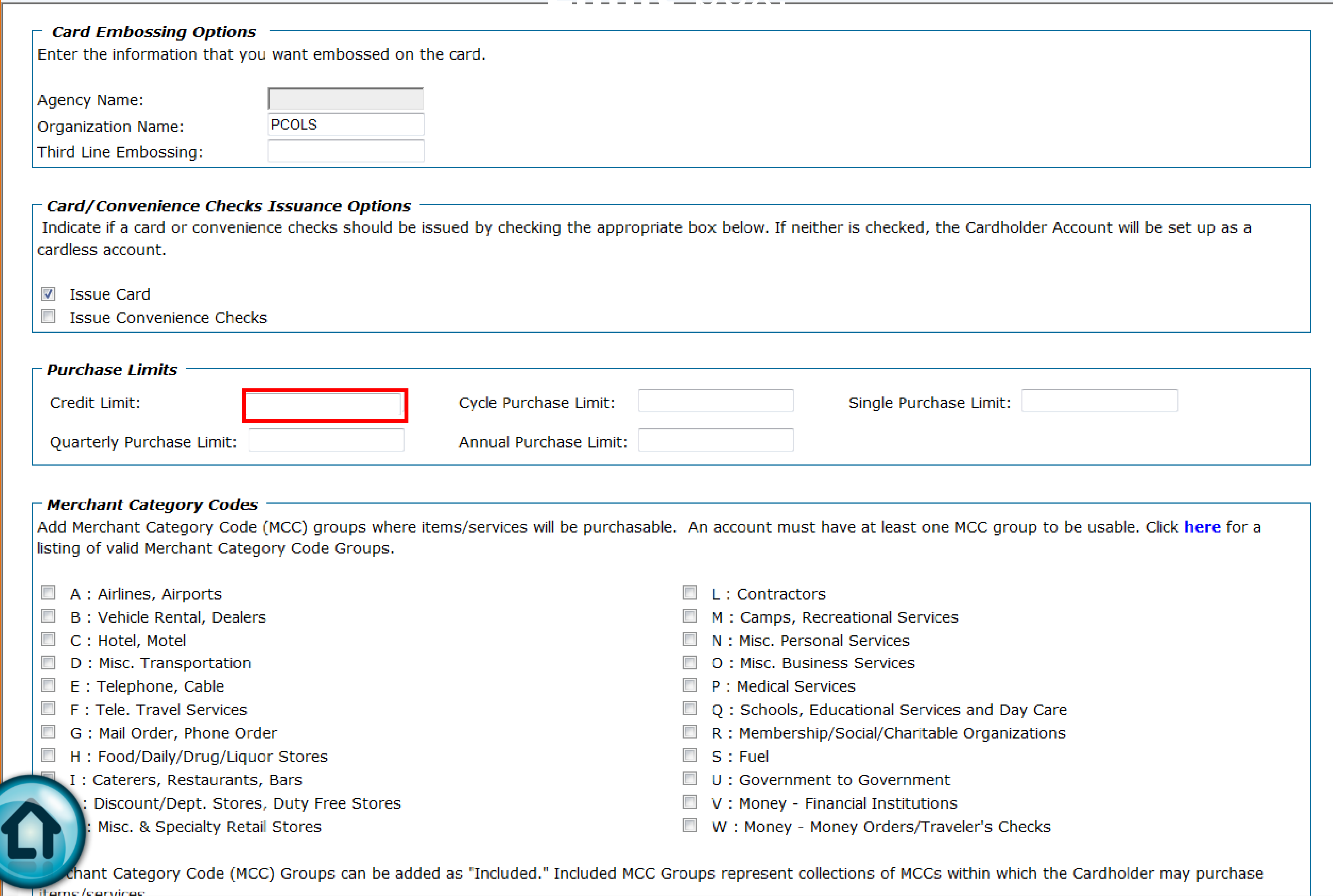
***d Embossing Options***

he information that you want embossed on the card.

y Name:

Organization Name: PCOLS

# The A/OPC has the option to enter **Card Embossing Options** and **Purchase Limits**. Click on the **Credit Limit** box.



***Card Embossing Options***

Enter the information that you want embossed on the card.

Agency Name:
Organization Name: PCOLS
Third Line Embossing:

***Card/Convenience Checks Issuance Options***

Indicate if a card or convenience checks should be issued by checking the appropriate box below. If neither is checked, the Cardholder Account will be set up as a cardless account.

☑ Issue Card
☐ Issue Convenience Checks

***Purchase Limits***

Credit Limit:
Cycle Purchase Limit:
Single Purchase Limit:
Quarterly Purchase Limit:
Annual Purchase Limit:

***Merchant Category Codes***

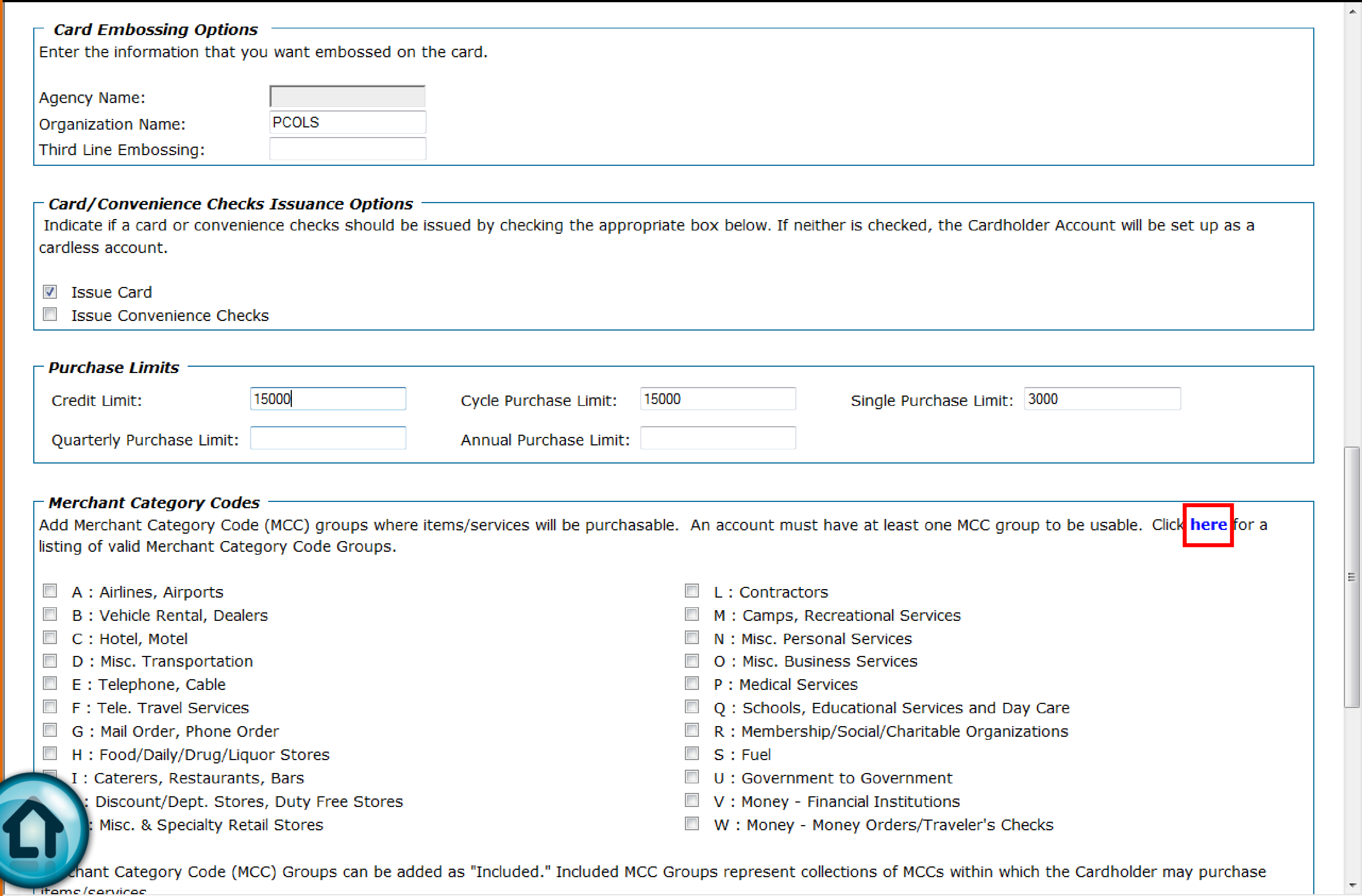
Add Merchant Category Code (MCC) groups where items/services will be purchasable. An account must have at least one MCC group to be usable. Click here for a listing of valid Merchant Category Code Groups.

☐ A : Airlines, Airports
☐ B : Vehicle Rental, Dealers
☐ C : Hotel, Motel
☐ D : Misc. Transportation
☐ E : Telephone, Cable
☐ F : Tele. Travel Services
☐ G : Mail Order, Phone Order
☐ H : Food/Daily/Drug/Liquor Stores
☐ I : Caterers, Restaurants, Bars
: Discount/Dept. Stores, Duty Free Stores
: Misc. & Specialty Retail Stores
☐ L : Contractors
☐ M : Camps, Recreational Services
☐ N : Misc. Personal Services
☐ O : Misc. Business Services
☐ P : Medical Services
☐ Q : Schools, Educational Services and Day Care
☐ R : Membership/Social/Charitable Organizations
☐ S : Fuel
☐ U : Government to Government
☐ V : Money - Financial Institutions
☐ W : Money - Money Orders/Traveler's Checks

chant Category Code (MCC) Groups can be added as "Included." Included MCC Groups represent collections of MCCs within which the Cardholder may purchase items/services

A/OPC Action 1 AIM: Initiate Request for New Cardholder Account

# The A/OPC has the option to add the Merchant Category Code (MCC) groups. To view valid combinations click the “here” link.



***Card Embossing Options***

Enter the information that you want embossed on the card.

Agency Name: 
Organization Name: PCOLS
Third Line Embossing:

***Card/Convenience Checks Issuance Options***

Indicate if a card or convenience checks should be issued by checking the appropriate box below. If neither is checked, the Cardholder Account will be set up as a cardless account.

☑ Issue Card
☐ Issue Convenience Checks

***Purchase Limits***

Credit Limit: 15000
Cycle Purchase Limit: 15000
Single Purchase Limit: 3000
Quarterly Purchase Limit: 
Annual Purchase Limit:

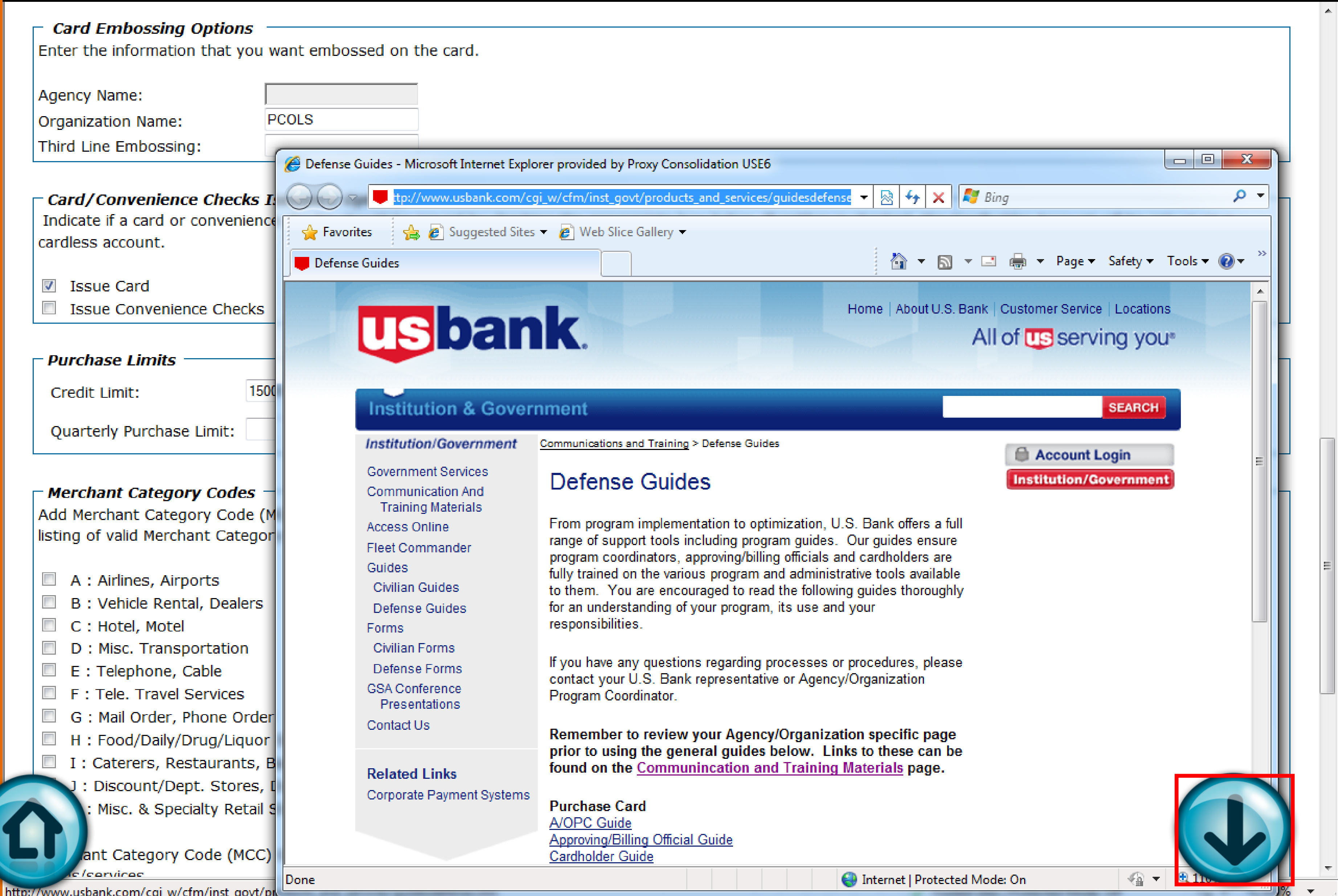
***Merchant Category Codes***

Add Merchant Category Code (MCC) groups where items/services will be purchasable. An account must have at least one MCC group to be usable. Click **here** for a listing of valid Merchant Category Code Groups.

☐ A : Airlines, Airports
☐ B : Vehicle Rental, Dealers
☐ C : Hotel, Motel
☐ D : Misc. Transportation
☐ E : Telephone, Cable
☐ F : Tele. Travel Services
☐ G : Mail Order, Phone Order
☐ H : Food/Daily/Drug/Liquor Stores
☐ I : Caterers, Restaurants, Bars
: Discount/Dept. Stores, Duty Free Stores
: Misc. & Specialty Retail Stores
☐ L : Contractors
☐ M : Camps, Recreational Services
☐ N : Misc. Personal Services
☐ O : Misc. Business Services
☐ P : Medical Services
☐ Q : Schools, Educational Services and Day Care
☐ R : Membership/Social/Charitable Organizations
☐ S : Fuel
☐ U : Government to Government
☐ V : Money - Financial Institutions
☐ W : Money - Money Orders/Traveler's Checks

chant Category Code (MCC) Groups can be added as "Included." Included MCC Groups represent collections of MCCs within which the Cardholder may purchase items/services

# A separate window will display from the US Bank website. Click the arrow to scroll down.



***Card Embossing Options***

Enter the information that you want embossed on the card.

Agency Name:

Organization Name: PCOLS

Third Line Embossing:

***Card/Convenience Checks I***

Indicate if a card or convenience
cardless account.

☑ Issue Card

☐ Issue Convenience Checks

***Purchase Limits***

Credit Limit: 1500

Quarterly Purchase Limit:

***Merchant Category Codes***

Add Merchant Category Code (M
listing of valid Merchant Categor

☐ A : Airlines, Airports
☐ B : Vehicle Rental, Dealers
☐ C : Hotel, Motel
☐ D : Misc. Transportation
☐ E : Telephone, Cable
☐ F : Tele. Travel Services
☐ G : Mail Order, Phone Order
☐ H : Food/Daily/Drug/Liquor
☐ I : Caterers, Restaurants, B
J : Discount/Dept. Stores, D
: Misc. & Specialty Retail S

ant Category Code (MCC)
s/services

http://www.usbank.com/cgi_w/cfm/inst_govt/pr

Defense Guides - Microsoft Internet Explorer provided by Proxy Consolidation USE6

ttp://www.usbank.com/cgi_w/cfm/inst_govt/products_and_services/guidesdefense

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**Related Links**

Corporate Payment Systems

Communications and Training > Defense Guides

## Defense Guides

From program implementation to optimization, U.S. Bank offers a full range of support tools including program guides. Our guides ensure program coordinators, approving/billing officials and cardholders are fully trained on the various program and administrative tools available to them. You are encouraged to read the following guides thoroughly for an understanding of your program, its use and your responsibilities.

If you have any questions regarding processes or procedures, please contact your U.S. Bank representative or Agency/Organization Program Coordinator.

**Remember to review your Agency/Organization specific page prior to using the general guides below. Links to these can be found on the Communincation and Training Materials page.**

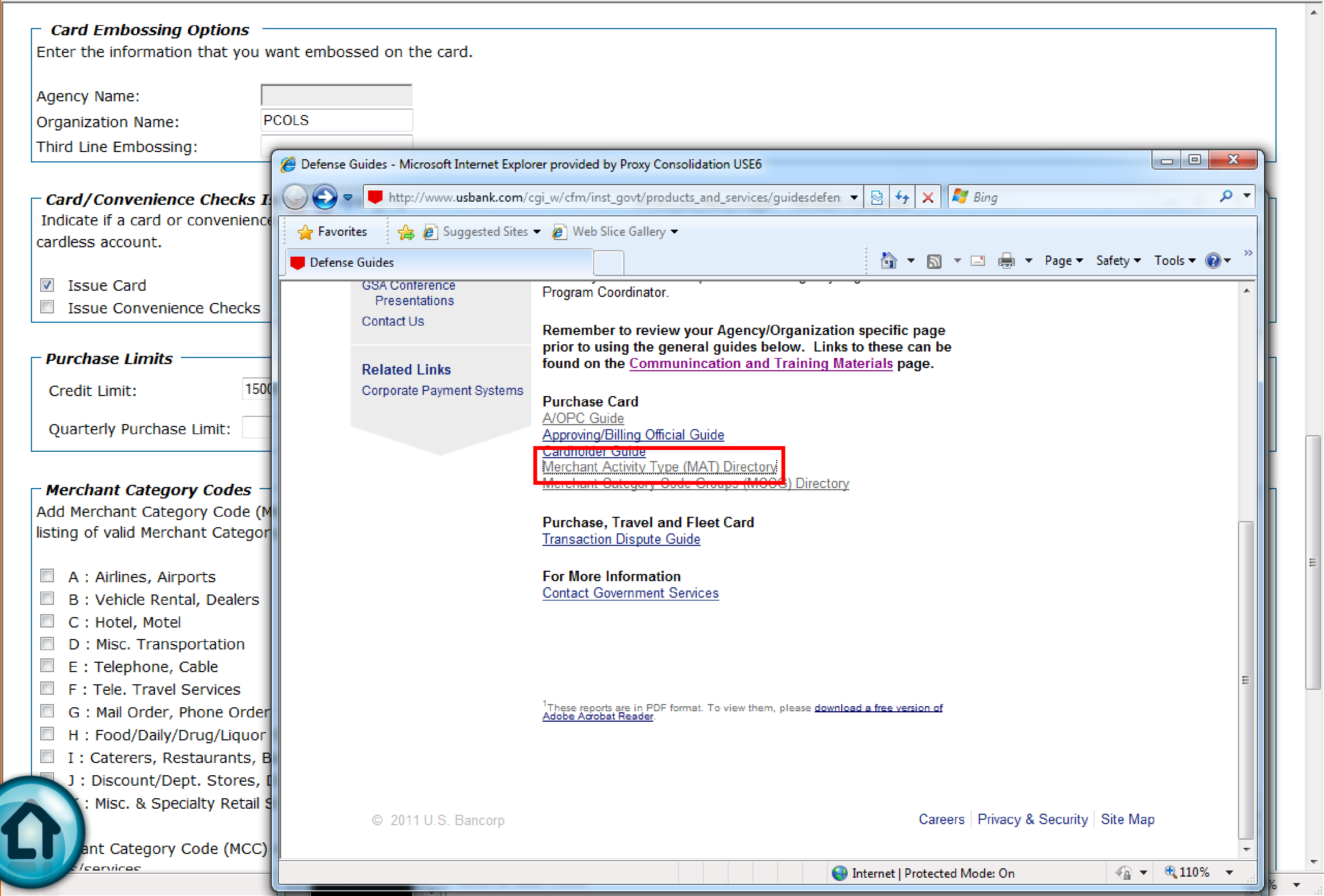
**Purchase Card**

A/OPC Guide
Approving/Billing Official Guide
Cardholder Guide

Done

Internet | Protected Mode: On

# Click the “Merchant Activity Type (MAT) Directory link.



***Card Embossing Options***

Enter the information that you want embossed on the card.

Agency Name:
Organization Name: PCOLS
Third Line Embossing:

***Card/Convenience Checks I***

Indicate if a card or convenienc
cardless account.

☑ Issue Card
☐ Issue Convenience Checks

***Purchase Limits***

Credit Limit: 150
Quarterly Purchase Limit:

***Merchant Category Codes***

Add Merchant Category Code (M
listing of valid Merchant Categor

☐ A : Airlines, Airports
☐ B : Vehicle Rental, Dealers
☐ C : Hotel, Motel
☐ D : Misc. Transportation
☐ E : Telephone, Cable
☐ F : Tele. Travel Services
☐ G : Mail Order, Phone Order
☐ H : Food/Daily/Drug/Liquor
☐ I : Caterers, Restaurants, B
☐ J : Discount/Dept. Stores, D
☐ : Misc. & Specialty Retail S

ant Category Code (MCC)
/services

Defense Guides - Microsoft Internet Explorer provided by Proxy Consolidation USE6

http://www.usbank.com/cgi_w/cfm/inst_govt/products_and_services/guidesdefen

GSA Conference Presentations
Contact Us

**Related Links**
Corporate Payment Systems

Program Coordinator.

**Remember to review your Agency/Organization specific page prior to using the general guides below. Links to these can be found on the Communincation and Training Materials page.**

**Purchase Card**
A/OPC Guide
Approving/Billing Official Guide
Cardholder Guide
Merchant Activity Type (MAT) Directory
Merchant Category Code Groups (MCCG) Directory

**Purchase, Travel and Fleet Card**
Transaction Dispute Guide

**For More Information**
Contact Government Services

[1]These reports are in PDF format. To view them, please download a free version of Adobe Acrobat Reader.

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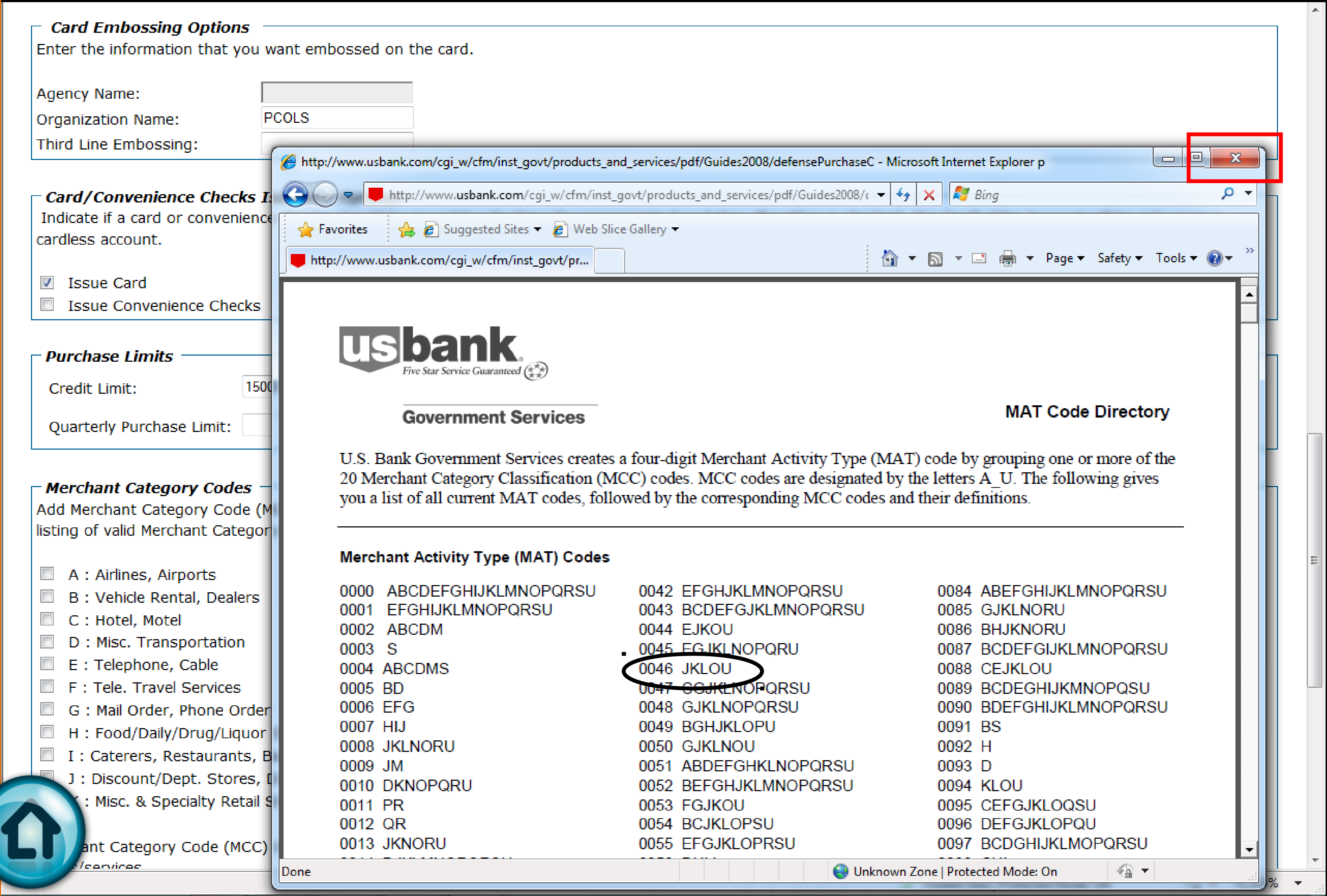
This shows valid combinations of the 20 Merchant Category Classification (MCC) codes. The A/OPC is using “JKLOU.” Click the “X” to close US Bank window.



***Card Embossing Options***

Enter the information that you want embossed on the card.

Agency Name:
Organization Name: PCOLS
Third Line Embossing:

***Card/Convenience Checks I***

Indicate if a card or convenienc
cardless account.

☑ Issue Card
☐ Issue Convenience Checks

***Purchase Limits***

Credit Limit: 1500
Quarterly Purchase Limit:

***Merchant Category Codes***

Add Merchant Category Code (M
listing of valid Merchant Categor

☐ A : Airlines, Airports
☐ B : Vehicle Rental, Dealers
☐ C : Hotel, Motel
☐ D : Misc. Transportation
☐ E : Telephone, Cable
☐ F : Tele. Travel Services
☐ G : Mail Order, Phone Order
☐ H : Food/Daily/Drug/Liquor
☐ I : Caterers, Restaurants, B
☐ J : Discount/Dept. Stores, D
K : Misc. & Specialty Retail S

ant Category Code (MCC)
/services

http://www.usbank.com/cgi_w/cfm/inst_govt/products_and_services/pdf/Guides2008/defensePurchaseC - Microsoft Internet Explorer p
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Bing
Favorites
Suggested Sites
Web Slice Gallery
http://www.usbank.com/cgi_w/cfm/inst_govt/pr...
Page
Safety
Tools
usbank
Five Star Service Guaranteed
Done
Unknown Zone | Protected Mode: On

**Government Services**

**MAT Code Directory**

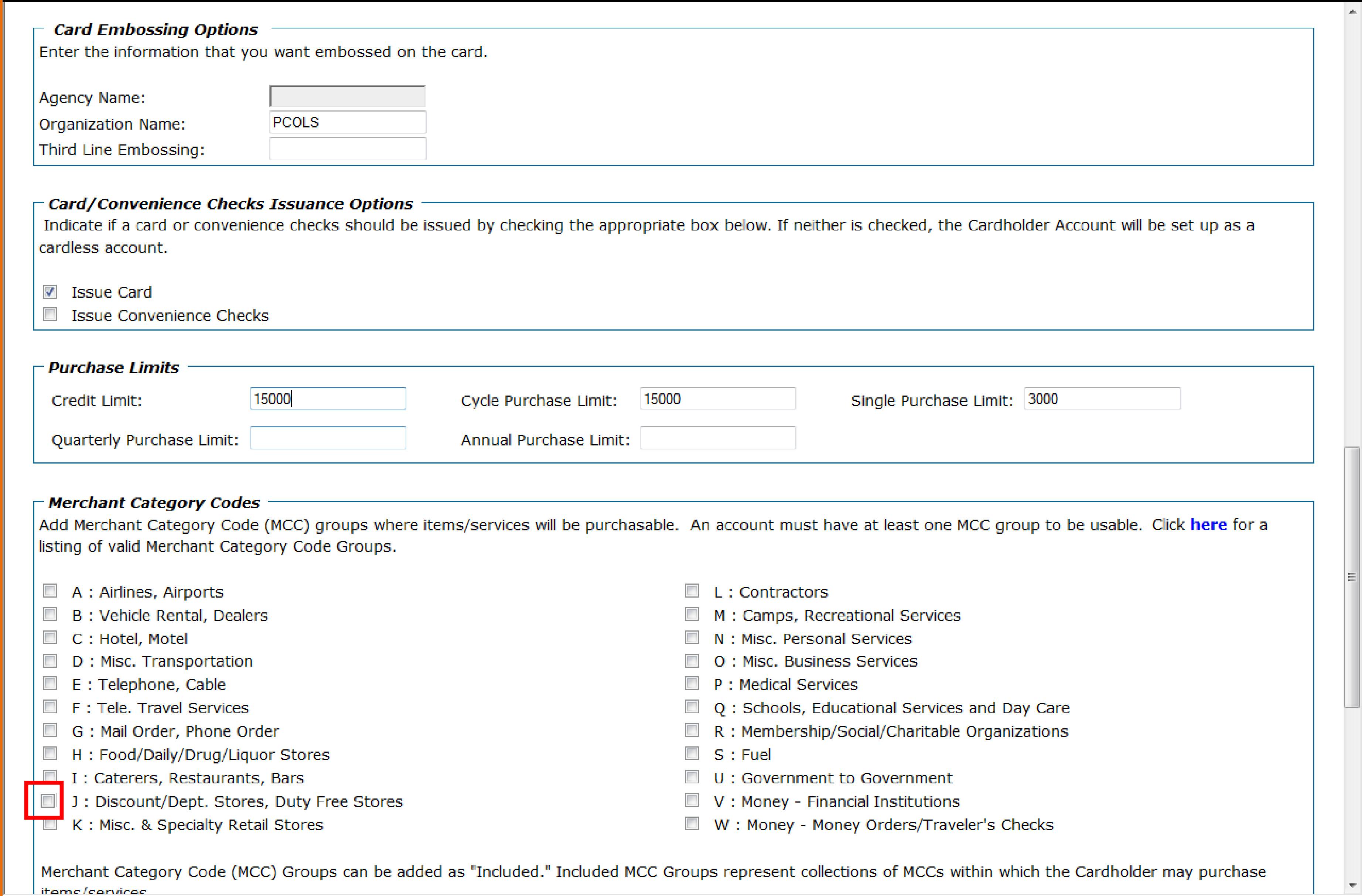
U.S. Bank Government Services creates a four-digit Merchant Activity Type (MAT) code by grouping one or more of the 20 Merchant Category Classification (MCC) codes. MCC codes are designated by the letters A_U. The following gives you a list of all current MAT codes, followed by the corresponding MCC codes and their definitions.

**Merchant Activity Type (MAT) Codes**

| | |
|---|---|
| 0000 | ABCDEFGHIJKLMNOPQRSU |
| 0001 | EFGHIJKLMNOPQRSU |
| 0002 | ABCDM |
| 0003 | S |
| 0004 | ABCDMS |
| 0005 | BD |
| 0006 | EFG |
| 0007 | HIJ |
| 0008 | JKLNORU |
| 0009 | JM |
| 0010 | DKNOPQRU |
| 0011 | PR |
| 0012 | QR |
| 0013 | JKNORU |
| 0042 | EFGHJKLMNOPQRSU |
| 0043 | BCDEFGJKLMNOPQRSU |
| 0044 | EJKOU |
| 0045 | EGJKLNOPQRU |
| 0046 | JKLOU |
| 0047 | CGJKLNOPQRSU |
| 0048 | GJKLNOPQRSU |
| 0049 | BGHJKLOPU |
| 0050 | GJKLNOU |
| 0051 | ABDEFGHKLNOPQRSU |
| 0052 | BEFGHJKLMNOPQRSU |
| 0053 | FGJKOU |
| 0054 | BCJKLOPSU |
| 0055 | EFGJKLOPRSU |
| 0084 | ABEFGHIJKLMNOPQRSU |
| 0085 | GJKLNORU |
| 0086 | BHJKNORU |
| 0087 | BCDEFGIJKLMNOPQRSU |
| 0088 | CEJKLOU |
| 0089 | BCDEGHIJKMNOPQSU |
| 0090 | BDEFGHIJKLMNOPQRSU |
| 0091 | BS |
| 0092 | H |
| 0093 | D |
| 0094 | KLOU |
| 0095 | CEFGJKLOQSU |
| 0096 | DEFGJKLOPQU |
| 0097 | BCDGHIJKLMOPQRSU |

A/OPC Action 1 AIM: Initiate Request for New
Cardholder Account

# Click the “J” box.



***Card Embossing Options***

Enter the information that you want embossed on the card.

Agency Name:
Organization Name: PCOLS
Third Line Embossing:

***Card/Convenience Checks Issuance Options***

Indicate if a card or convenience checks should be issued by checking the appropriate box below. If neither is checked, the Cardholder Account will be set up as a cardless account.

☑ Issue Card
☐ Issue Convenience Checks

***Purchase Limits***

Credit Limit: 15000
Cycle Purchase Limit: 15000
Single Purchase Limit: 3000
Quarterly Purchase Limit:
Annual Purchase Limit:

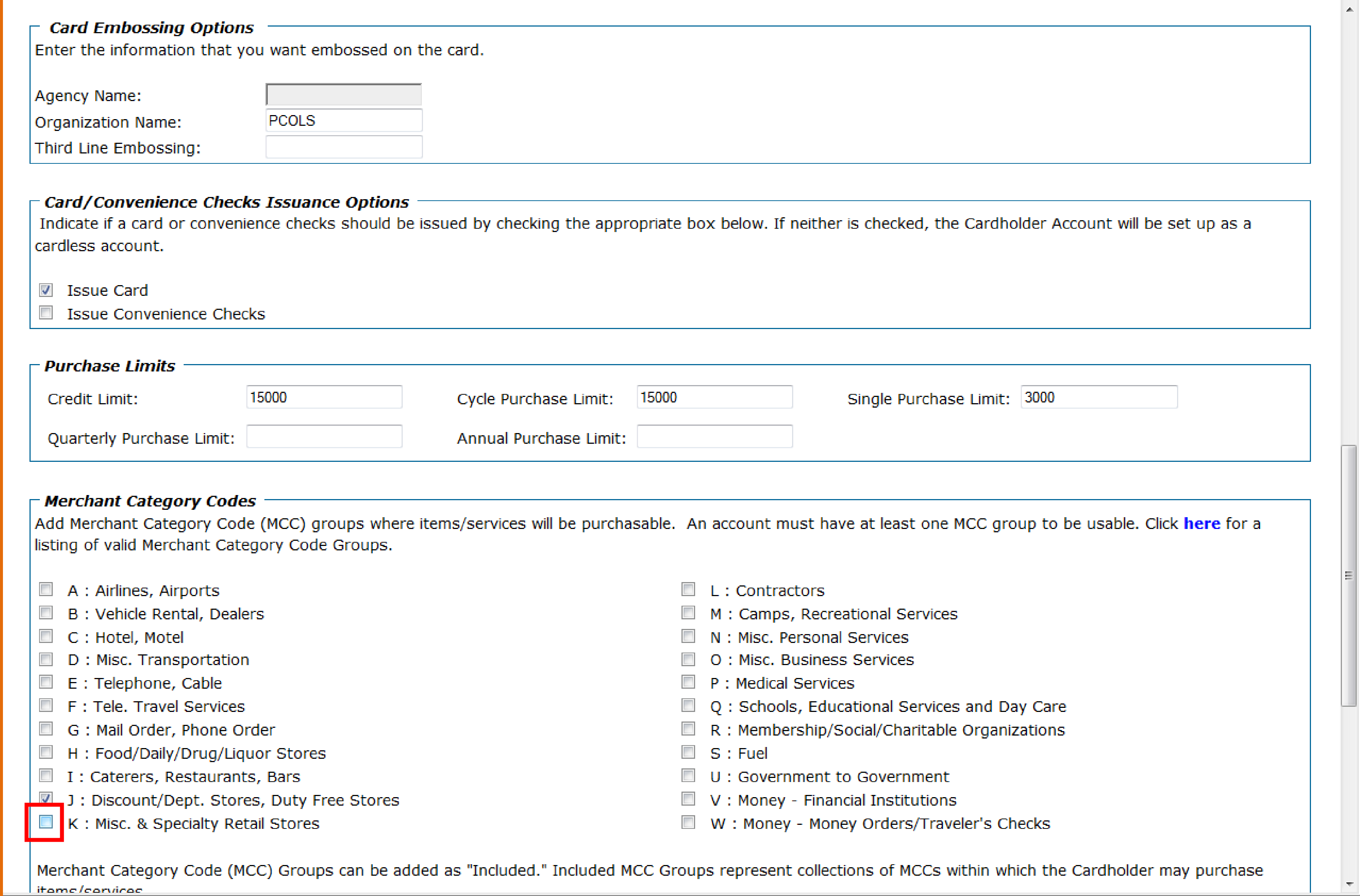
***Merchant Category Codes***

Add Merchant Category Code (MCC) groups where items/services will be purchasable. An account must have at least one MCC group to be usable. Click here for a listing of valid Merchant Category Code Groups.

☐ A : Airlines, Airports
☐ B : Vehicle Rental, Dealers
☐ C : Hotel, Motel
☐ D : Misc. Transportation
☐ E : Telephone, Cable
☐ F : Tele. Travel Services
☐ G : Mail Order, Phone Order
☐ H : Food/Daily/Drug/Liquor Stores
☐ I : Caterers, Restaurants, Bars
☐ J : Discount/Dept. Stores, Duty Free Stores
☐ K : Misc. & Specialty Retail Stores
☐ L : Contractors
☐ M : Camps, Recreational Services
☐ N : Misc. Personal Services
☐ O : Misc. Business Services
☐ P : Medical Services
☐ Q : Schools, Educational Services and Day Care
☐ R : Membership/Social/Charitable Organizations
☐ S : Fuel
☐ U : Government to Government
☐ V : Money - Financial Institutions
☐ W : Money - Money Orders/Traveler's Checks

Merchant Category Code (MCC) Groups can be added as "Included." Included MCC Groups represent collections of MCCs within which the Cardholder may purchase items/services

# Click the “K” box.



***Card Embossing Options***

Enter the information that you want embossed on the card.

Agency Name:
Organization Name: PCOLS
Third Line Embossing:

***Card/Convenience Checks Issuance Options***

Indicate if a card or convenience checks should be issued by checking the appropriate box below. If neither is checked, the Cardholder Account will be set up as a cardless account.

☑ Issue Card
☐ Issue Convenience Checks

***Purchase Limits***

Credit Limit: 15000
Cycle Purchase Limit: 15000
Single Purchase Limit: 3000
Quarterly Purchase Limit:
Annual Purchase Limit:

***Merchant Category Codes***

Add Merchant Category Code (MCC) groups where items/services will be purchasable. An account must have at least one MCC group to be usable. Click here for a listing of valid Merchant Category Code Groups.

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☐ M : Camps, Recreational Services
☐ N : Misc. Personal Services
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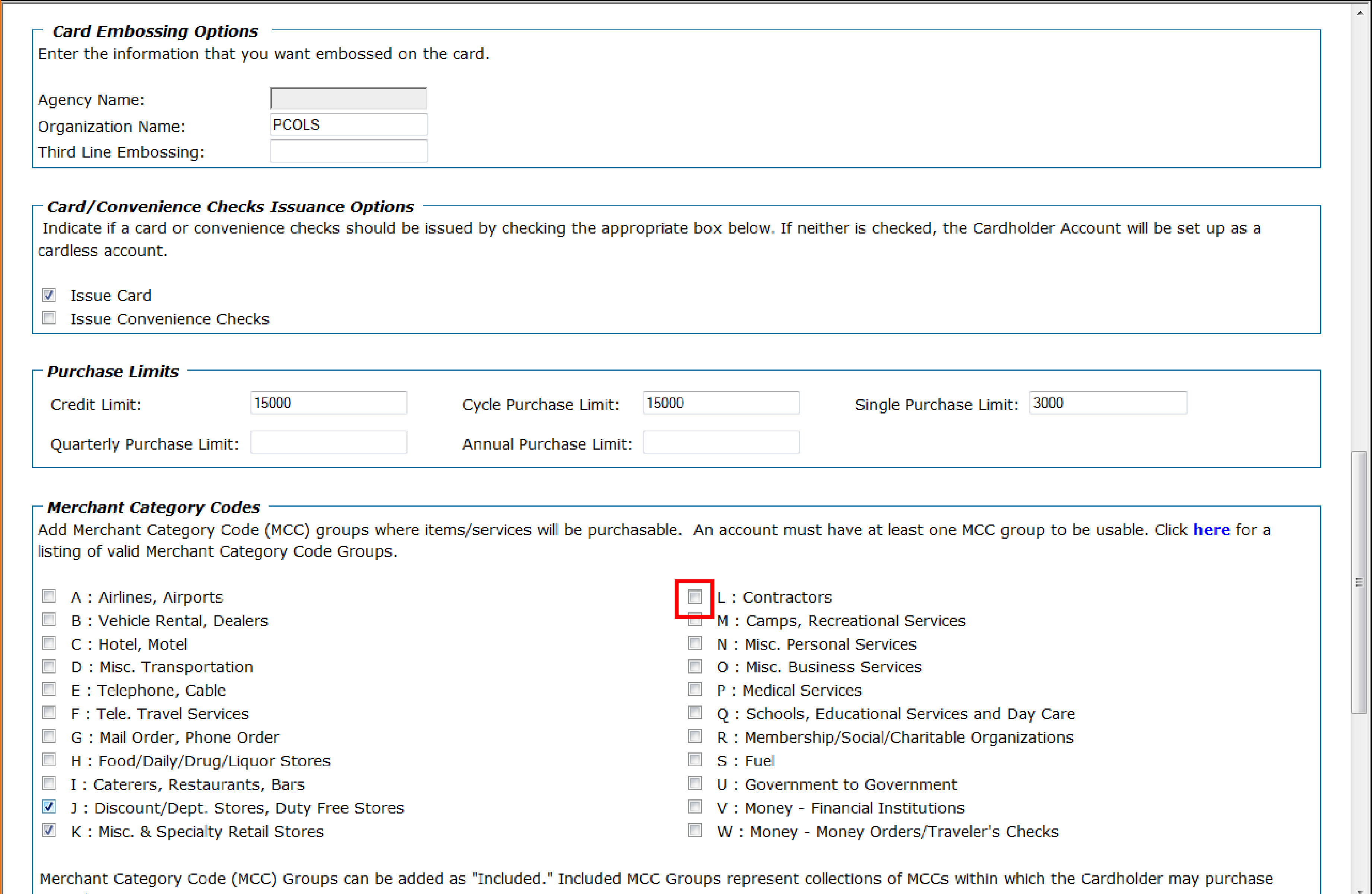
☐ P : Medical Services
☐ Q : Schools, Educational Services and Day Care
☐ R : Membership/Social/Charitable Organizations
☐ S : Fuel
☐ U : Government to Government
☐ V : Money - Financial Institutions
☐ W : Money - Money Orders/Traveler's Checks

Merchant Category Code (MCC) Groups can be added as "Included." Included MCC Groups represent collections of MCCs within which the Cardholder may purchase items/services

# Click the “L” box.



***Card Embossing Options***

Enter the information that you want embossed on the card.

Agency Name:
Organization Name: PCOLS
Third Line Embossing:

***Card/Convenience Checks Issuance Options***

Indicate if a card or convenience checks should be issued by checking the appropriate box below. If neither is checked, the Cardholder Account will be set up as a cardless account.

☑ Issue Card
☐ Issue Convenience Checks

***Purchase Limits***

Credit Limit: 15000
Cycle Purchase Limit: 15000
Single Purchase Limit: 3000
Quarterly Purchase Limit:
Annual Purchase Limit:

***Merchant Category Codes***

Add Merchant Category Code (MCC) groups where items/services will be purchasable. An account must have at least one MCC group to be usable. Click **here** for a listing of valid Merchant Category Code Groups.

☐ A : Airlines, Airports
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☐ F : Tele. Travel Services
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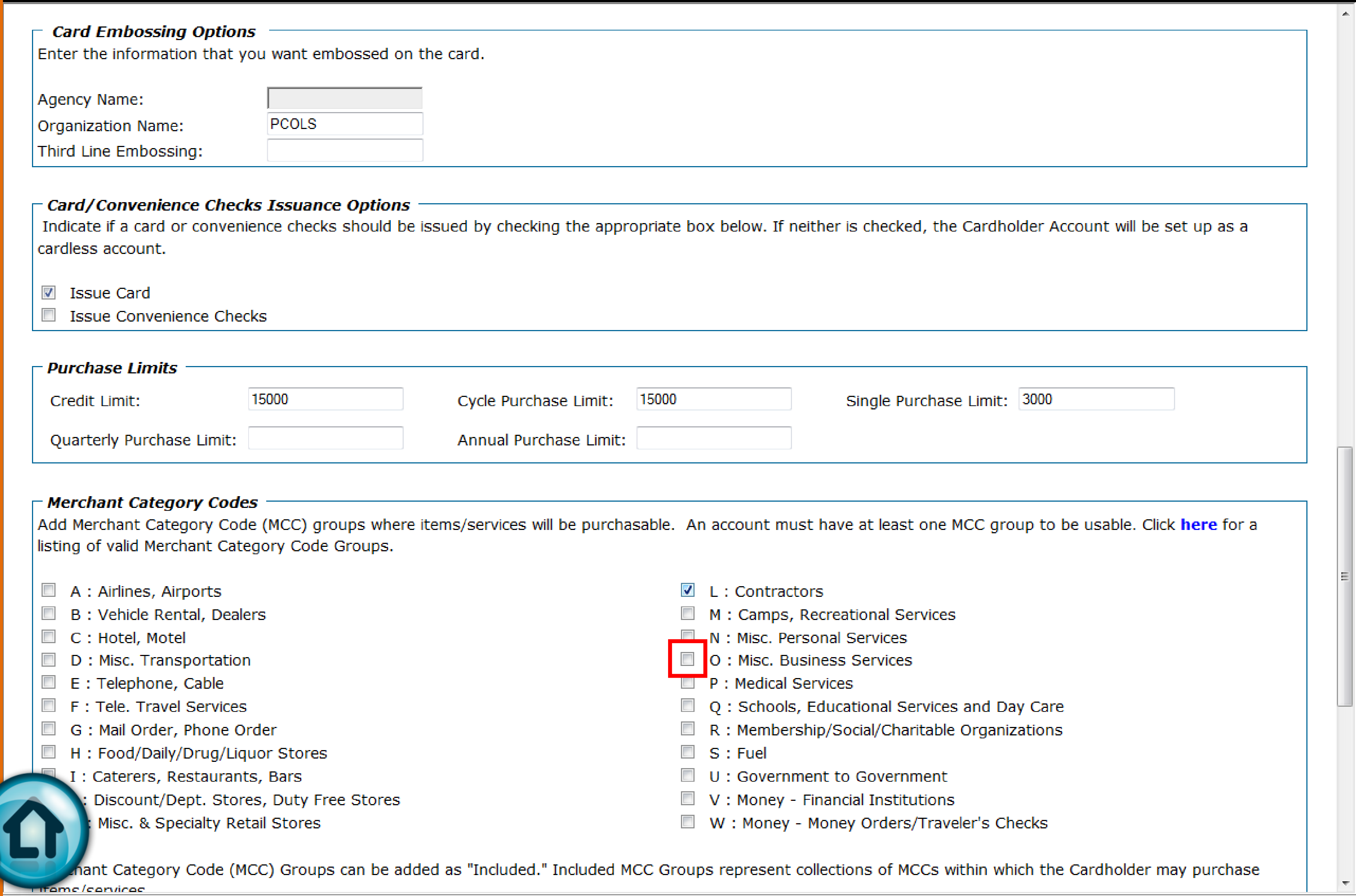
☑ J : Discount/Dept. Stores, Duty Free Stores
☑ K : Misc. & Specialty Retail Stores
☐ L : Contractors
☐ M : Camps, Recreational Services
☐ N : Misc. Personal Services
☐ O : Misc. Business Services
☐ P : Medical Services
☐ Q : Schools, Educational Services and Day Care
☐ R : Membership/Social/Charitable Organizations
☐ S : Fuel
☐ U : Government to Government
☐ V : Money - Financial Institutions
☐ W : Money - Money Orders/Traveler's Checks

Merchant Category Code (MCC) Groups can be added as "Included." Included MCC Groups represent collections of MCCs within which the Cardholder may purchase

# Click the “O” box.



***Card Embossing Options***

Enter the information that you want embossed on the card.

Agency Name:
Organization Name: PCOLS
Third Line Embossing:

***Card/Convenience Checks Issuance Options***

Indicate if a card or convenience checks should be issued by checking the appropriate box below. If neither is checked, the Cardholder Account will be set up as a cardless account.

☑ Issue Card
☐ Issue Convenience Checks

***Purchase Limits***

Credit Limit: 15000
Cycle Purchase Limit: 15000
Single Purchase Limit: 3000
Quarterly Purchase Limit:
Annual Purchase Limit:

***Merchant Category Codes***

Add Merchant Category Code (MCC) groups where items/services will be purchasable. An account must have at least one MCC group to be usable. Click **here** for a listing of valid Merchant Category Code Groups.

☐ A : Airlines, Airports
☐ B : Vehicle Rental, Dealers
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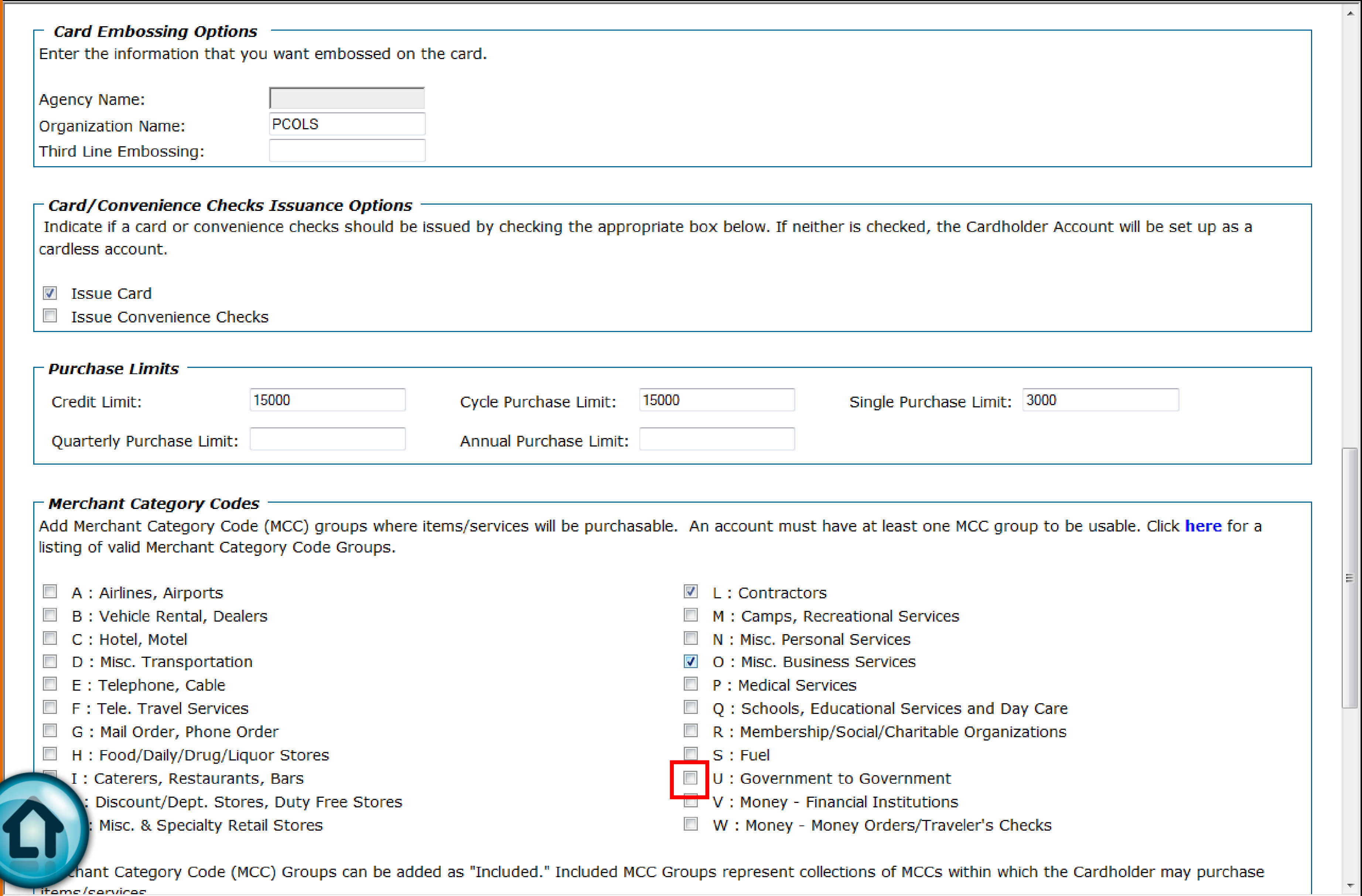
☐ E : Telephone, Cable
☐ F : Tele. Travel Services
☐ G : Mail Order, Phone Order
☐ H : Food/Daily/Drug/Liquor Stores
☐ I : Caterers, Restaurants, Bars
: Discount/Dept. Stores, Duty Free Stores
: Misc. & Specialty Retail Stores

☑ L : Contractors
☐ M : Camps, Recreational Services
☐ N : Misc. Personal Services
☐ O : Misc. Business Services
☐ P : Medical Services
☐ Q : Schools, Educational Services and Day Care
☐ R : Membership/Social/Charitable Organizations
☐ S : Fuel
☐ U : Government to Government
☐ V : Money - Financial Institutions
☐ W : Money - Money Orders/Traveler's Checks

hant Category Code (MCC) Groups can be added as "Included." Included MCC Groups represent collections of MCCs within which the Cardholder may purchase items/services

# Click the “U” box.



***Card Embossing Options***

Enter the information that you want embossed on the card.

| | |
|---|---|
| Agency Name: | |
| Organization Name: | PCOLS |
| Third Line Embossing: | |

***Card/Convenience Checks Issuance Options***

Indicate if a card or convenience checks should be issued by checking the appropriate box below. If neither is checked, the Cardholder Account will be set up as a cardless account.

☑ Issue Card
☐ Issue Convenience Checks

***Purchase Limits***

| | | | | | |
|---|---|---|---|---|---|
| Credit Limit: | 15000 | Cycle Purchase Limit: | 15000 | Single Purchase Limit: | 3000 |
| Quarterly Purchase Limit: | | Annual Purchase Limit: | | | |

***Merchant Category Codes***

Add Merchant Category Code (MCC) groups where items/services will be purchasable. An account must have at least one MCC group to be usable. Click **here** for a listing of valid Merchant Category Code Groups.

☐ A : Airlines, Airports
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☐ M : Camps, Recreational Services
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☐ S : Fuel
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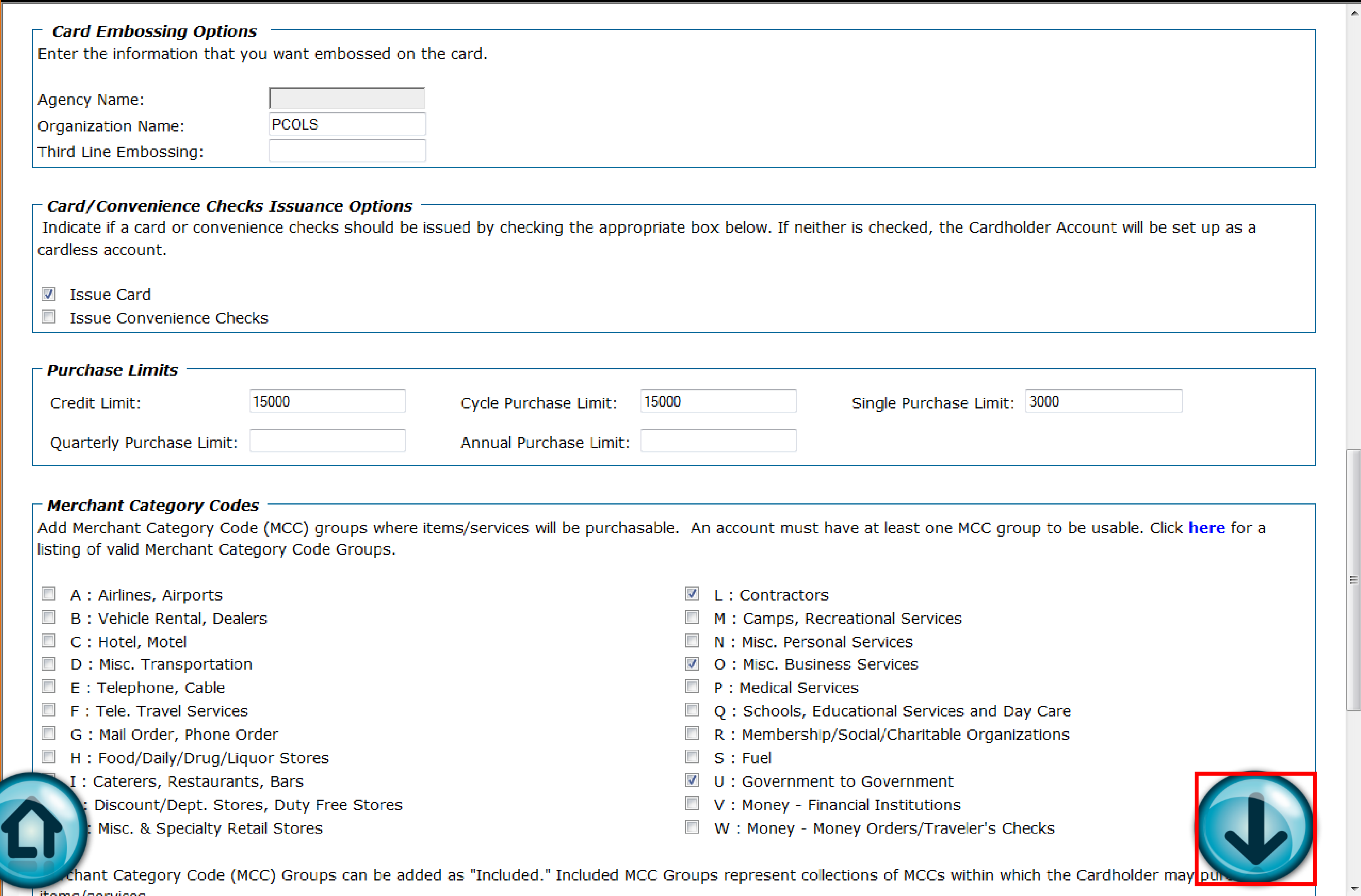
☐ W : Money - Money Orders/Traveler's Checks

chant Category Code (MCC) Groups can be added as "Included." Included MCC Groups represent collections of MCCs within which the Cardholder may purchase items/services

A/OPC Action 1 AIM: Initiate Request for New Cardholder Account

# The A/OPC has selected "JKLOU." Click on the arrow to scroll down.



***Card Embossing Options***

Enter the information that you want embossed on the card.

| | |
|---|---|
| Agency Name: | |
| Organization Name: | PCOLS |
| Third Line Embossing: | |

***Card/Convenience Checks Issuance Options***

Indicate if a card or convenience checks should be issued by checking the appropriate box below. If neither is checked, the Cardholder Account will be set up as a cardless account.

- ☑ Issue Card
- ☐ Issue Convenience Checks

***Purchase Limits***

| | | | | | |
|---|---|---|---|---|---|
| Credit Limit: | 15000 | Cycle Purchase Limit: | 15000 | Single Purchase Limit: | 3000 |
| Quarterly Purchase Limit: | | Annual Purchase Limit: | | | |

***Merchant Category Codes***

Add Merchant Category Code (MCC) groups where items/services will be purchasable. An account must have at least one MCC group to be usable. Click **here** for a listing of valid Merchant Category Code Groups.

- ☐ A : Airlines, Airports
- ☐ B : Vehicle Rental, Dealers
- ☐ C : Hotel, Motel
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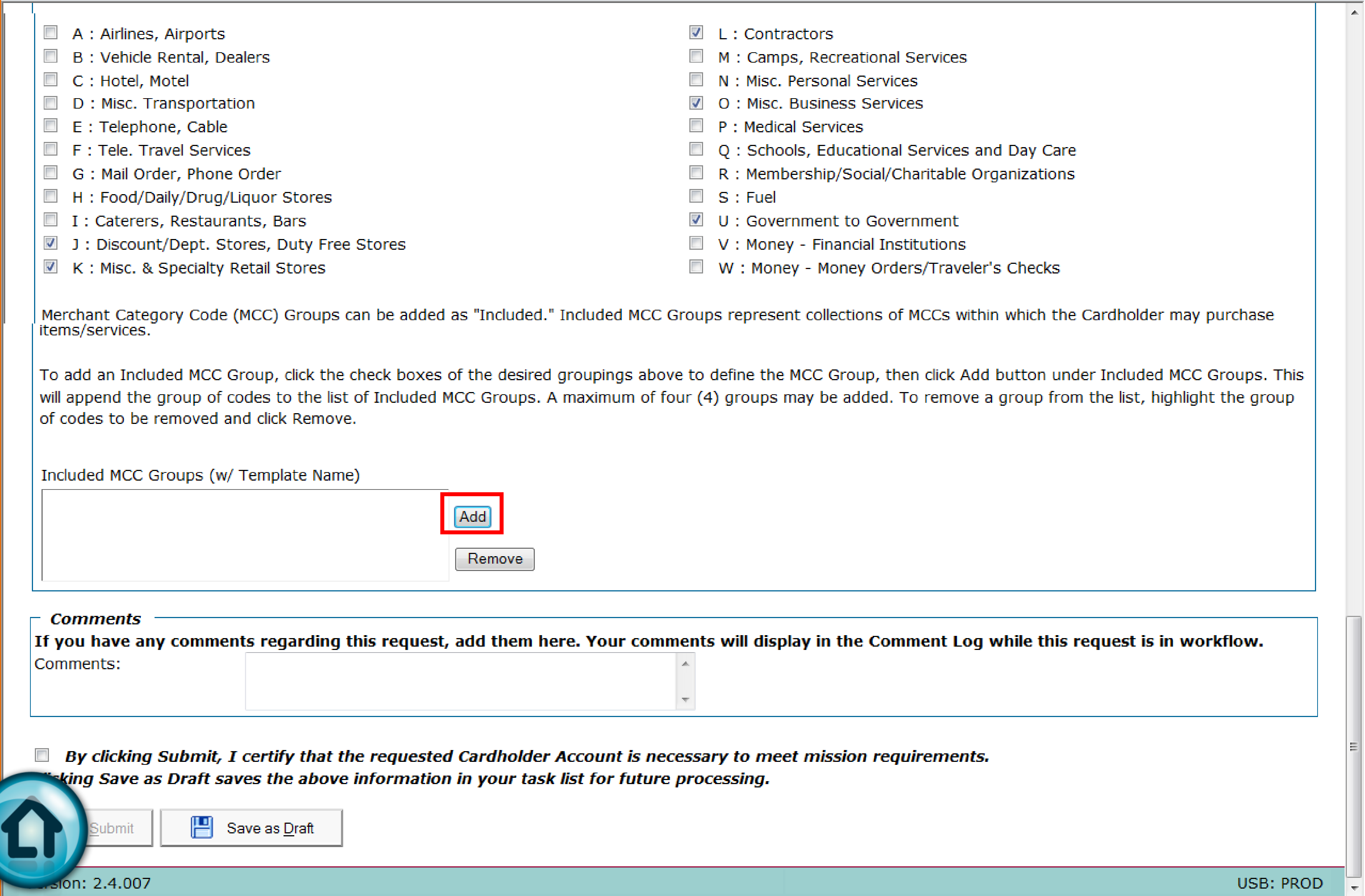
- ☐ W : Money - Money Orders/Traveler's Checks

chant Category Code (MCC) Groups can be added as "Included." Included MCC Groups represent collections of MCCs within which the Cardholder may pur

items/services

# To add the desired grouping to the MCC Group, click the add button.



- ☐ A : Airlines, Airports
- ☐ B : Vehicle Rental, Dealers
- ☐ C : Hotel, Motel
- ☐ D : Misc. Transportation
- ☐ E : Telephone, Cable
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- ☐ Q : Schools, Educational Services and Day Care
- ☐ R : Membership/Social/Charitable Organizations
- ☐ S : Fuel
- ☑ U : Government to Government
- ☐ V : Money - Financial Institutions
- ☐ W : Money - Money Orders/Traveler's Checks

Merchant Category Code (MCC) Groups can be added as "Included." Included MCC Groups represent collections of MCCs within which the Cardholder may purchase items/services.

To add an Included MCC Group, click the check boxes of the desired groupings above to define the MCC Group, then click Add button under Included MCC Groups. This will append the group of codes to the list of Included MCC Groups. A maximum of four (4) groups may be added. To remove a group from the list, highlight the group of codes to be removed and click Remove.

Included MCC Groups (w/ Template Name)

***Comments***

**If you have any comments regarding this request, add them here. Your comments will display in the Comment Log while this request is in workflow.**

Comments:

☐ ***By clicking Submit, I certify that the requested Cardholder Account is necessary to meet mission requirements.***

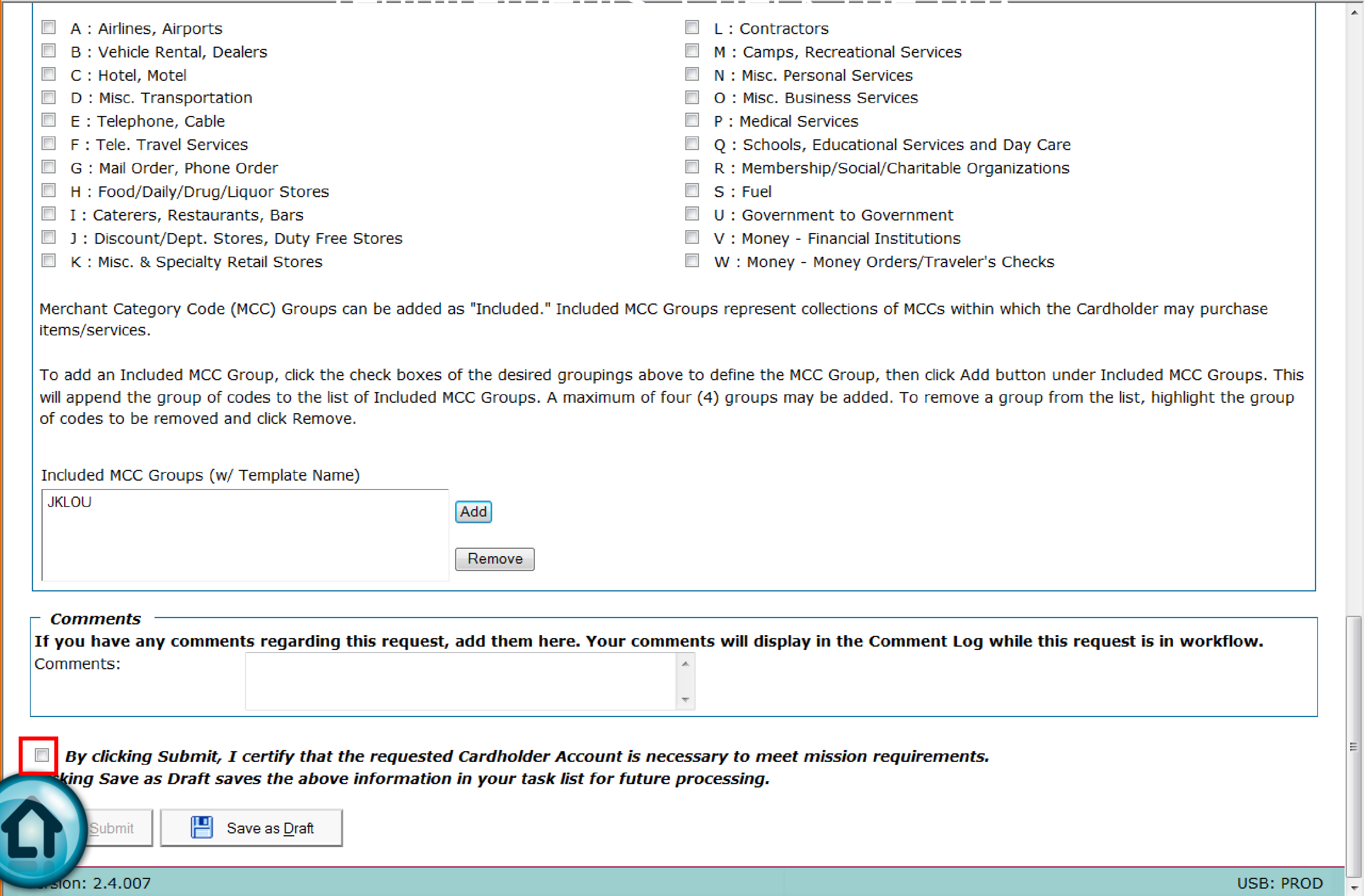
***king Save as Draft saves the above information in your task list for future processing.***

sion: 2.4.007

USB: PROD

## A/OPC Action 1 AIM: Initiate Request for New Cardholder Account

# The A/OPC checks the box acknowledging that clicking the "Submit" button certifies that the requested Cardholder Account is necessary to meet mission requirements. Check the box.



- ☐ A : Airlines, Airports
- ☐ B : Vehicle Rental, Dealers
- ☐ C : Hotel, Motel
- ☐ D : Misc. Transportation
- ☐ E : Telephone, Cable
- ☐ F : Tele. Travel Services
- ☐ G : Mail Order, Phone Order
- ☐ H : Food/Daily/Drug/Liquor Stores
- ☐ I : Caterers, Restaurants, Bars
- ☐ J : Discount/Dept. Stores, Duty Free Stores
- ☐ K : Misc. & Specialty Retail Stores
- ☐ L : Contractors
- ☐ M : Camps, Recreational Services
- ☐ N : Misc. Personal Services
- ☐ O : Misc. Business Services
- ☐ P : Medical Services
- ☐ Q : Schools, Educational Services and Day Care
- ☐ R : Membership/Social/Charitable Organizations
- ☐ S : Fuel
- ☐ U : Government to Government
- ☐ V : Money - Financial Institutions
- ☐ W : Money - Money Orders/Traveler's Checks

Merchant Category Code (MCC) Groups can be added as "Included." Included MCC Groups represent collections of MCCs within which the Cardholder may purchase items/services.

To add an Included MCC Group, click the check boxes of the desired groupings above to define the MCC Group, then click Add button under Included MCC Groups. This will append the group of codes to the list of Included MCC Groups. A maximum of four (4) groups may be added. To remove a group from the list, highlight the group of codes to be removed and click Remove.

Included MCC Groups (w/ Template Name)

JKLOU

*Comments*

**If you have any comments regarding this request, add them here. Your comments will display in the Comment Log while this request is in workflow.**

Comments:

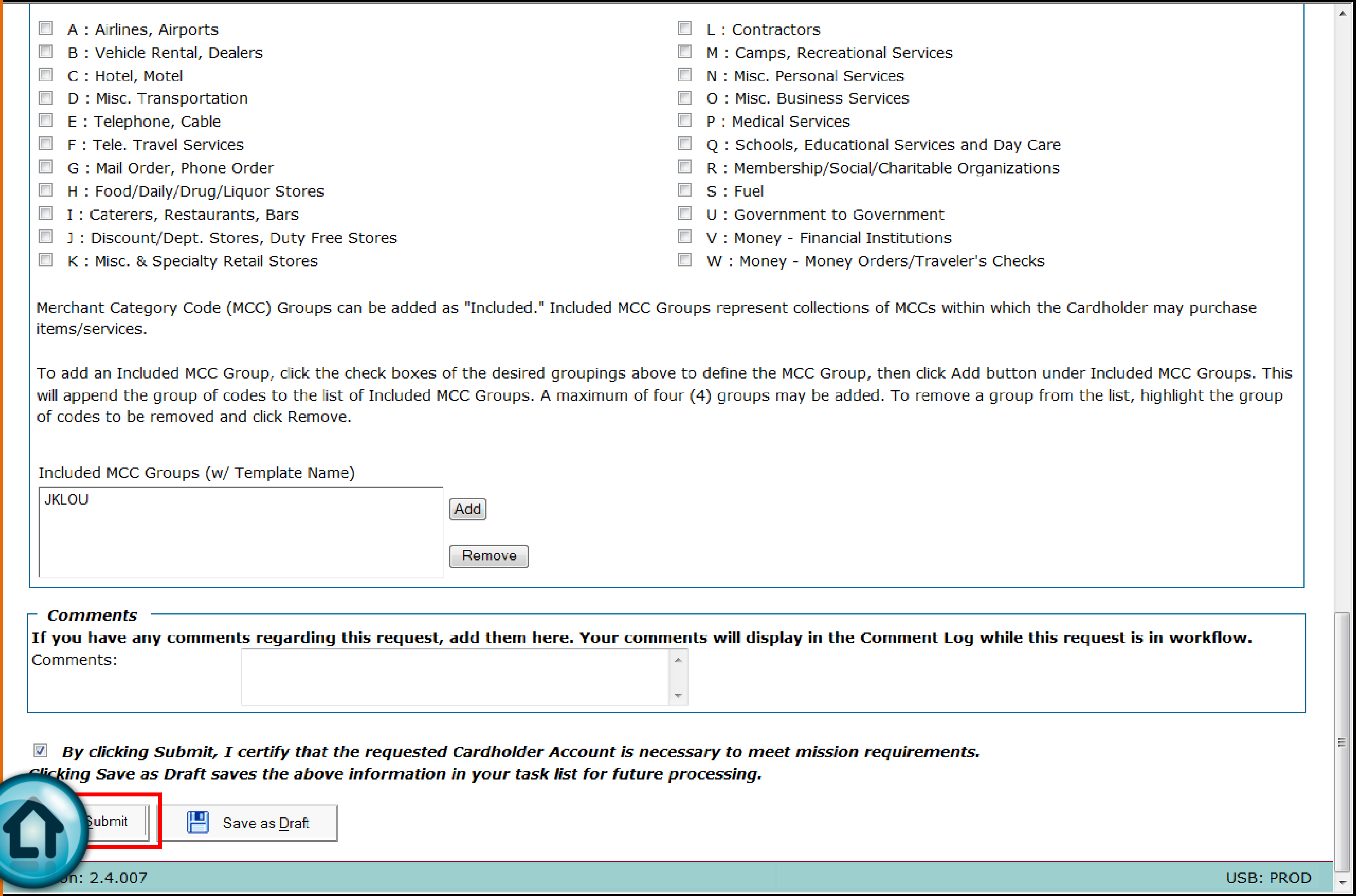
☐ ***By clicking Submit, I certify that the requested Cardholder Account is necessary to meet mission requirements.***

***king Save as Draft saves the above information in your task list for future processing.***

sion: 2.4.007

USB: PROD

# The A/OPC has the option to Submit or Save as Draft. Click the "Submit" button.



☐ A : Airlines, Airports
☐ B : Vehicle Rental, Dealers
☐ C : Hotel, Motel
☐ D : Misc. Transportation
☐ E : Telephone, Cable
☐ F : Tele. Travel Services
☐ G : Mail Order, Phone Order
☐ H : Food/Daily/Drug/Liquor Stores
☐ I : Caterers, Restaurants, Bars
☐ J : Discount/Dept. Stores, Duty Free Stores
☐ K : Misc. & Specialty Retail Stores
☐ L : Contractors
☐ M : Camps, Recreational Services
☐ N : Misc. Personal Services
☐ O : Misc. Business Services
☐ P : Medical Services
☐ Q : Schools, Educational Services and Day Care
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Included MCC Groups (w/ Template Name)
JKLOU

*Comments*

**If you have any comments regarding this request, add them here. Your comments will display in the Comment Log while this request is in workflow.**

Comments:

☑ ***By clicking Submit, I certify that the requested Cardholder Account is necessary to meet mission requirements.***

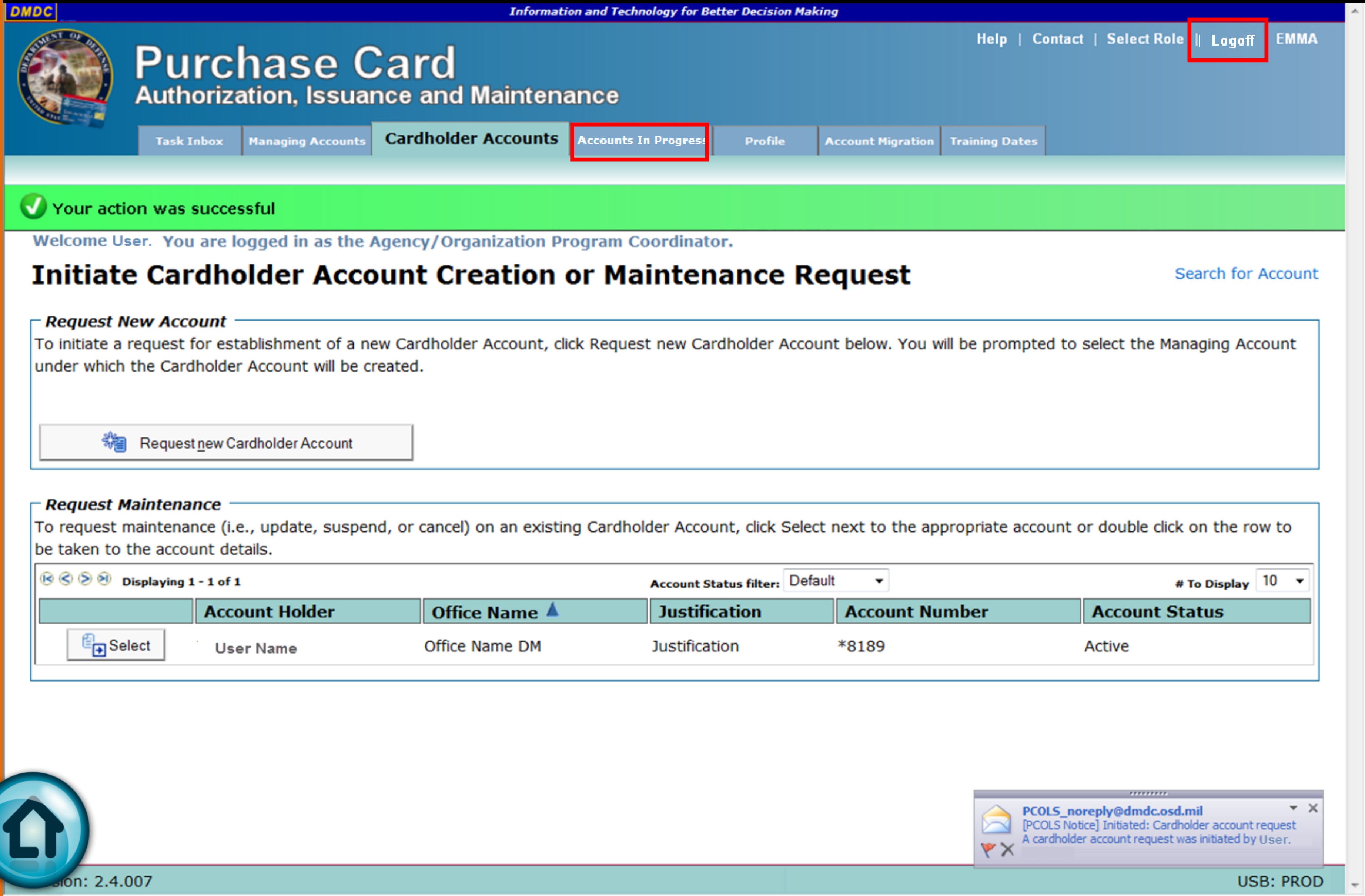
***Clicking Save as Draft saves the above information in your task list for future processing.***

on: 2.4.007

USB: PROD

A/OPC Action 1 AIM: Initiate Request for New Cardholder Account

The action is successful. To check the workflow status of this account click the "Accounts in Progress" tab. To continue on to the next step, click the "Logoff" link.



DMDC
Information and Technology for Better Decision Making
Help | Contact | Select Role | Logoff EMMA
Purchase Card
Authorization, Issuance and Maintenance
Task Inbox
Managing Accounts
Cardholder Accounts
Accounts In Progress
Profile
Account Migration
Training Dates

Your action was successful

Welcome User. You are logged in as the Agency/Organization Program Coordinator.

**Initiate Cardholder Account Creation or Maintenance Request**

Search for Account

***Request New Account***

To initiate a request for establishment of a new Cardholder Account, click Request new Cardholder Account below. You will be prompted to select the Managing Account under which the Cardholder Account will be created.

Request new Cardholder Account

***Request Maintenance***

To request maintenance (i.e., update, suspend, or cancel) on an existing Cardholder Account, click Select next to the appropriate account or double click on the row to be taken to the account details.

Displaying 1 - 1 of 1

Account Status filter: Default

# To Display 10

| | Account Holder | Office Name | Justification | Account Number | Account Status |
|---|---|---|---|---|---|
| Select | User Name | Office Name DM | Justification | *8189 | Active |

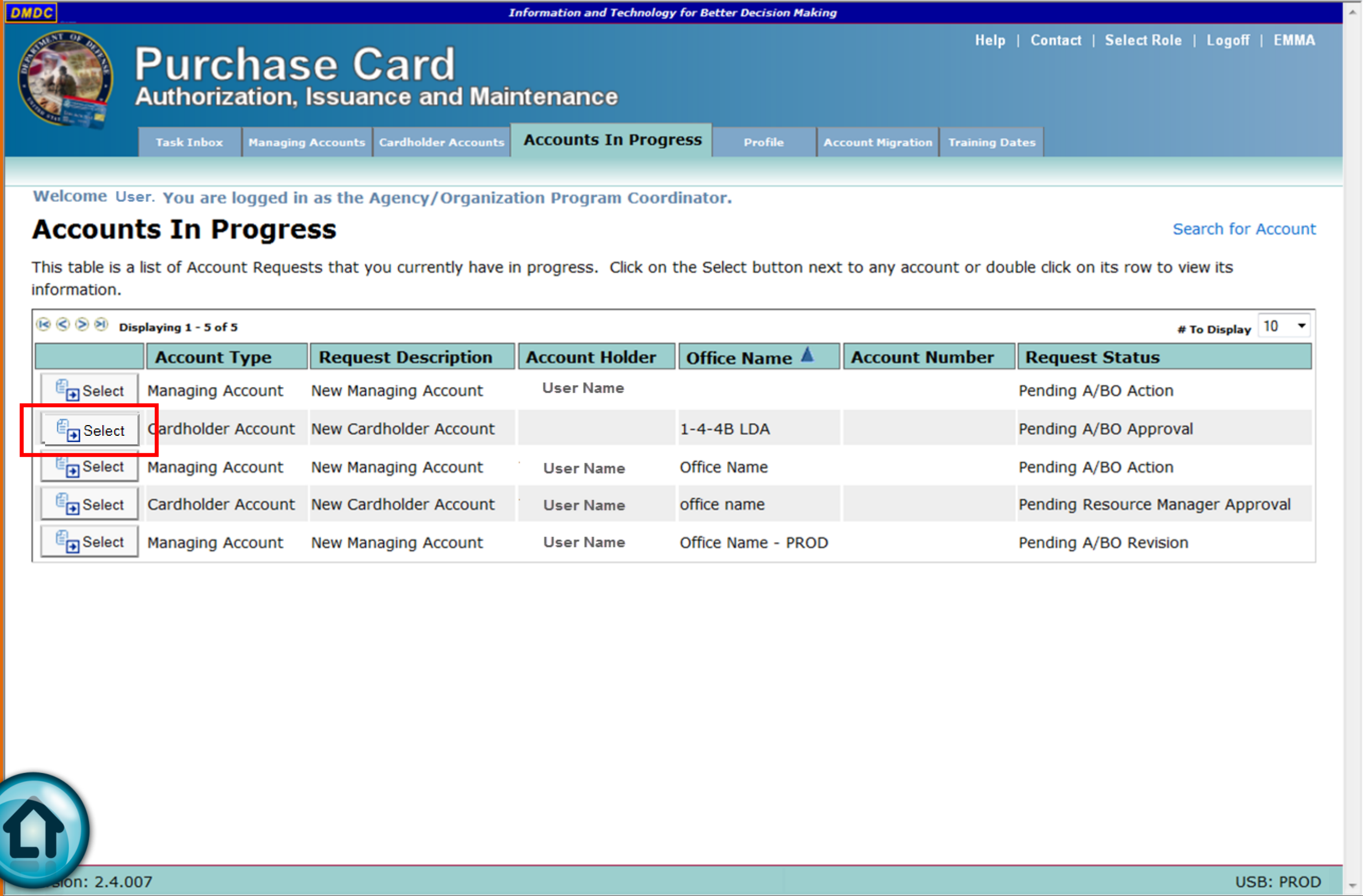
PCOLS_noreply@dmdc.osd.mil
[PCOLS Notice] Initiated: Cardholder account request
A cardholder account request was initiated by User.

sion: 2.4.007

USB: PROD

A/OPC Action 1 AIM: Initiate Request for New Cardholder Account

# Click the “Select” button to review the information for the Cardholder Account and see additional options available to the A/OPC.


DMDC
Information and Technology for Better Decision Making
Help | Contact | Select Role | Logoff | EMMA
Purchase Card
Authorization, Issuance and Maintenance
Task Inbox
Managing Accounts
Cardholder Accounts
Accounts In Progress
Profile
Account Migration
Training Dates

Welcome User. You are logged in as the Agency/Organization Program Coordinator.

## Accounts In Progress

Search for Account

This table is a list of Account Requests that you currently have in progress. Click on the Select button next to any account or double click on its row to view its information.

Displaying 1 - 5 of 5

# To Display 10

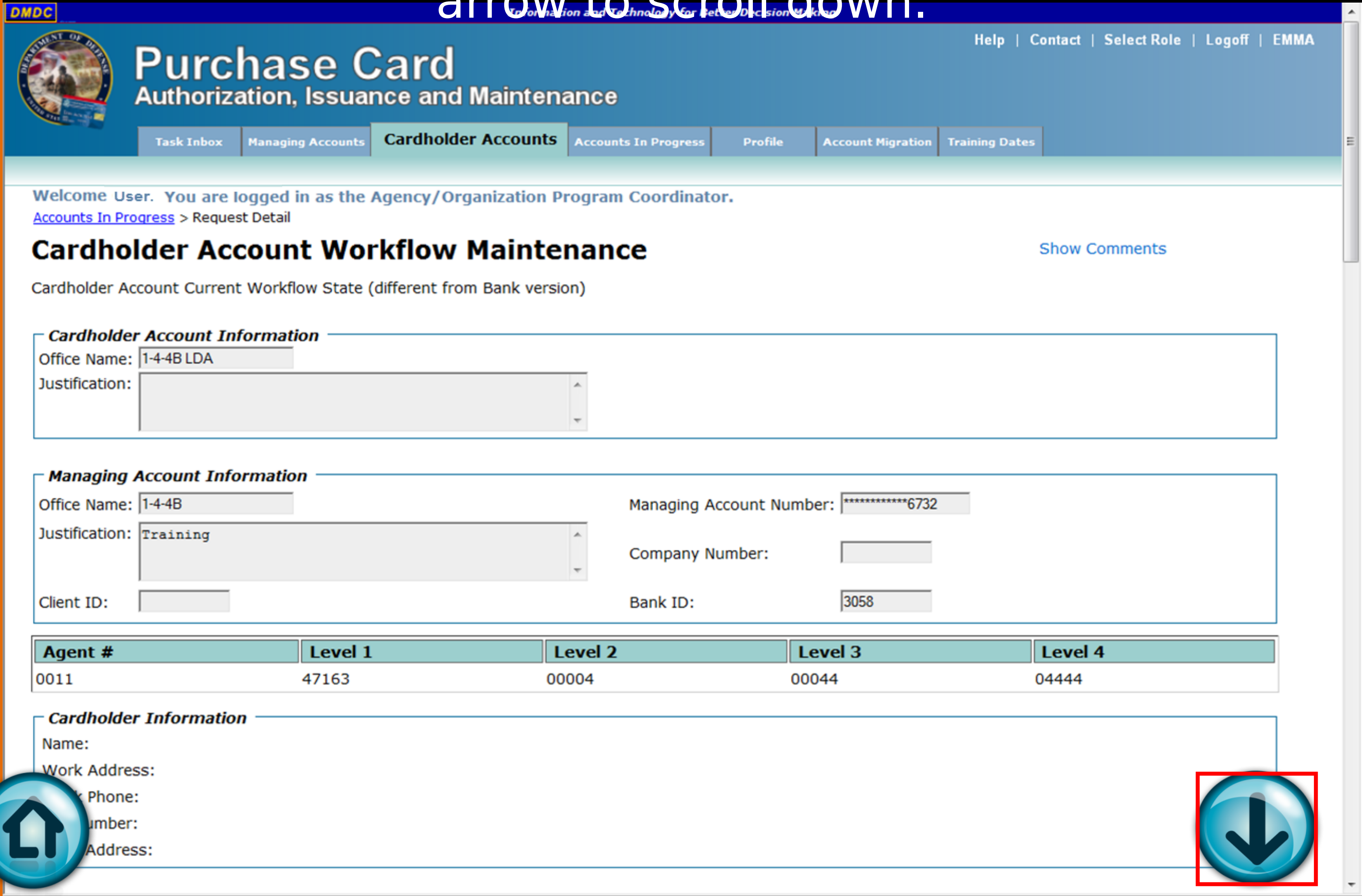
| | Account Type | Request Description | Account Holder | Office Name | Account Number | Request Status |
|---|---|---|---|---|---|---|
| Select | Managing Account | New Managing Account | User Name | | | Pending A/BO Action |
| Select | Cardholder Account | New Cardholder Account | | 1-4-4B LDA | | Pending A/BO Approval |
| Select | Managing Account | New Managing Account | User Name | Office Name | | Pending A/BO Action |
| Select | Cardholder Account | New Cardholder Account | User Name | office name | | Pending Resource Manager Approval |
| Select | Managing Account | New Managing Account | User Name | Office Name - PROD | | Pending A/BO Revision |

sion: 2.4.007

USB: PROD

## A/OPC Action 1 AIM: Initiate Request for New Cardholder Account

The cardholder account information is displayed below. The cardholder information is blank will be filled in once the cardholder redeems their nomination. Click the arrow to scroll down.


DMDC
Information and Technology for Better Decision Making
Help | Contact | Select Role | Logoff | EMMA
Purchase Card
Authorization, Issuance and Maintenance
Task Inbox
Managing Accounts
Cardholder Accounts
Accounts In Progress
Profile
Account Migration
Training Dates

Welcome User. You are logged in as the Agency/Organization Program Coordinator.

Accounts In Progress > Request Detail

### Cardholder Account Workflow Maintenance

Show Comments

Cardholder Account Current Workflow State (different from Bank version)

***Cardholder Account Information***

Office Name: 1-4-4B LDA

Justification:

***Managing Account Information***

Office Name: 1-4-4B

Managing Account Number: ************6732

Justification: Training

Company Number:

Client ID:

Bank ID: 3058

| Agent # | Level 1 | Level 2 | Level 3 | Level 4 |
|---|---|---|---|---|
| 0011 | 47163 | 00004 | 00044 | 04444 |

***Cardholder Information***

Name:

Work Address:

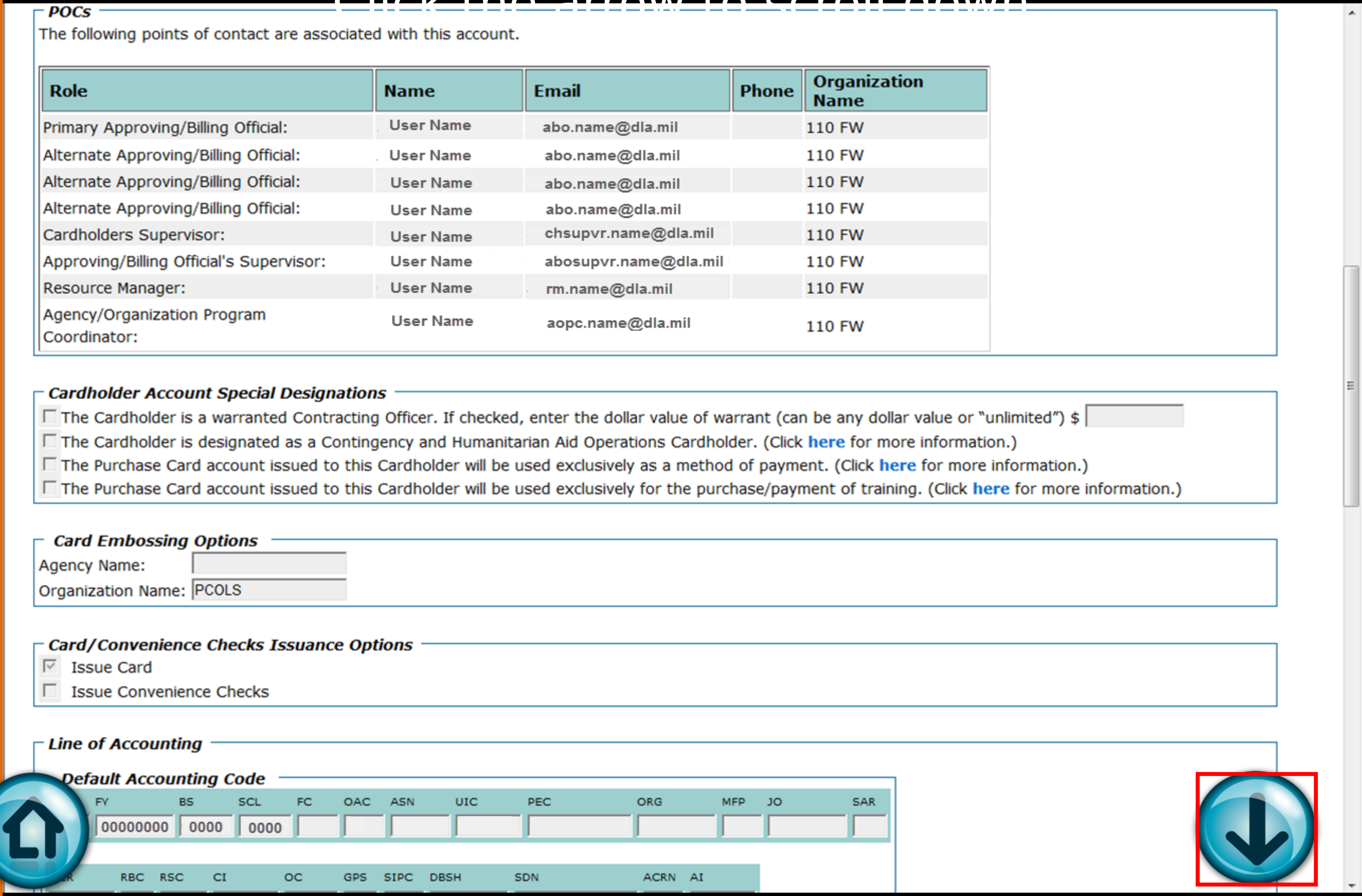
k Phone:

umber:

Address:

# A/OPC Action 1 AIM: Initiate Request for New Cardholder Account

The cardholder account information is displayed below. Note that additional workflows for this account cannot be initiated until the currently one has been completed. Click the arrow to scroll down.



***POCs***

The following points of contact are associated with this account.

| Role | Name | Email | Phone | Organization Name |
|---|---|---|---|---|
| Primary Approving/Billing Official: | User Name | abo.name@dla.mil | | 110 FW |
| Alternate Approving/Billing Official: | User Name | abo.name@dla.mil | | 110 FW |
| Alternate Approving/Billing Official: | User Name | abo.name@dla.mil | | 110 FW |
| Alternate Approving/Billing Official: | User Name | abo.name@dla.mil | | 110 FW |
| Cardholders Supervisor: | User Name | chsupvr.name@dla.mil | | 110 FW |
| Approving/Billing Official's Supervisor: | User Name | abosupvr.name@dla.mil | | 110 FW |
| Resource Manager: | User Name | rm.name@dla.mil | | 110 FW |
| Agency/Organization Program Coordinator: | User Name | aopc.name@dla.mil | | 110 FW |

***Cardholder Account Special Designations***

☐ The Cardholder is a warranted Contracting Officer. If checked, enter the dollar value of warrant (can be any dollar value or "unlimited") $

☐ The Cardholder is designated as a Contingency and Humanitarian Aid Operations Cardholder. (Click here for more information.)

☐ The Purchase Card account issued to this Cardholder will be used exclusively as a method of payment. (Click here for more information.)

☐ The Purchase Card account issued to this Cardholder will be used exclusively for the purchase/payment of training. (Click here for more information.)

***Card Embossing Options***

Agency Name:

Organization Name: PCOLS

***Card/Convenience Checks Issuance Options***

☑ Issue Card

☐ Issue Convenience Checks

***Line of Accounting***

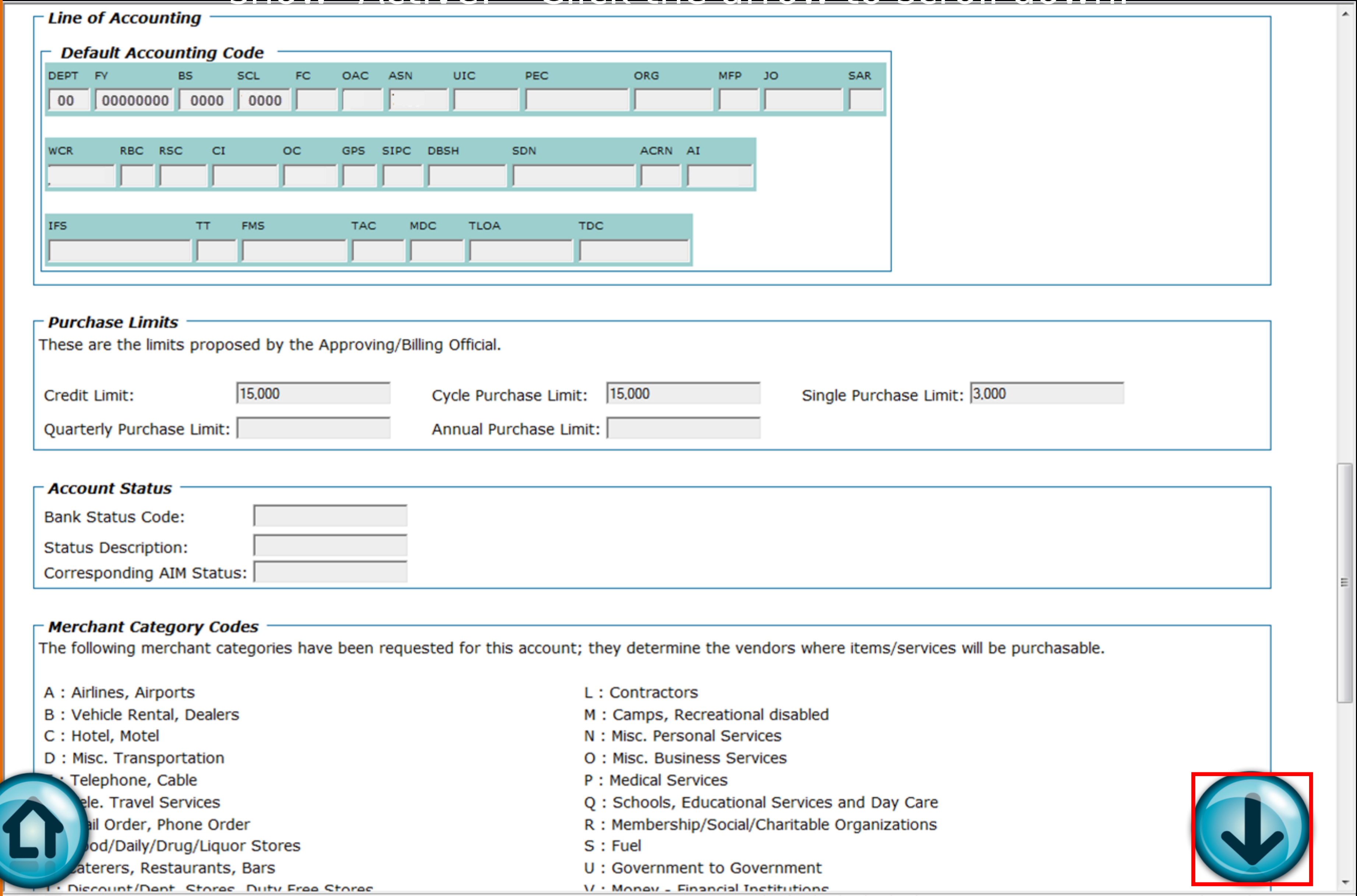
***Default Accounting Code***

| FY | BS | SCL | FC | OAC | ASN | UIC | PEC | ORG | MFP | JO | SAR |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 00000000 | 0000 | 0000 | | | | | | | | | |

| RBC | RSC | CI | OC | GPS | SIPC | DBSH | SDN | ACRN | AI |
|---|---|---|---|---|---|---|---|---|---|

A/OPC Action 1 AIM: Initiate Request for New
Cardholder Account

The cardholder account information is displayed below. The status code for this account is currently blank. Once the workflow is complete and the account has processed at the bank, the status will show "Active." Click the arrow to scroll down.



**Line of Accounting**

**Default Accounting Code**

| DEPT | FY | BS | SCL | FC | OAC | ASN | UIC | PEC | ORG | MFP | JO | SAR |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 00 | 00000000 | 0000 | 0000 | | | | | | | | | |

| WCR | RBC | RSC | CI | OC | GPS | SIPC | DBSH | SDN | ACRN | AI |
|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | | | |

| IFS | TT | FMS | TAC | MDC | TLOA | TDC |
|---|---|---|---|---|---|---|
| | | | | | | |

**Purchase Limits**

These are the limits proposed by the Approving/Billing Official.

Credit Limit: 15,000
Cycle Purchase Limit: 15,000
Single Purchase Limit: 3,000
Quarterly Purchase Limit:
Annual Purchase Limit:

**Account Status**

Bank Status Code:
Status Description:
Corresponding AIM Status:

**Merchant Category Codes**

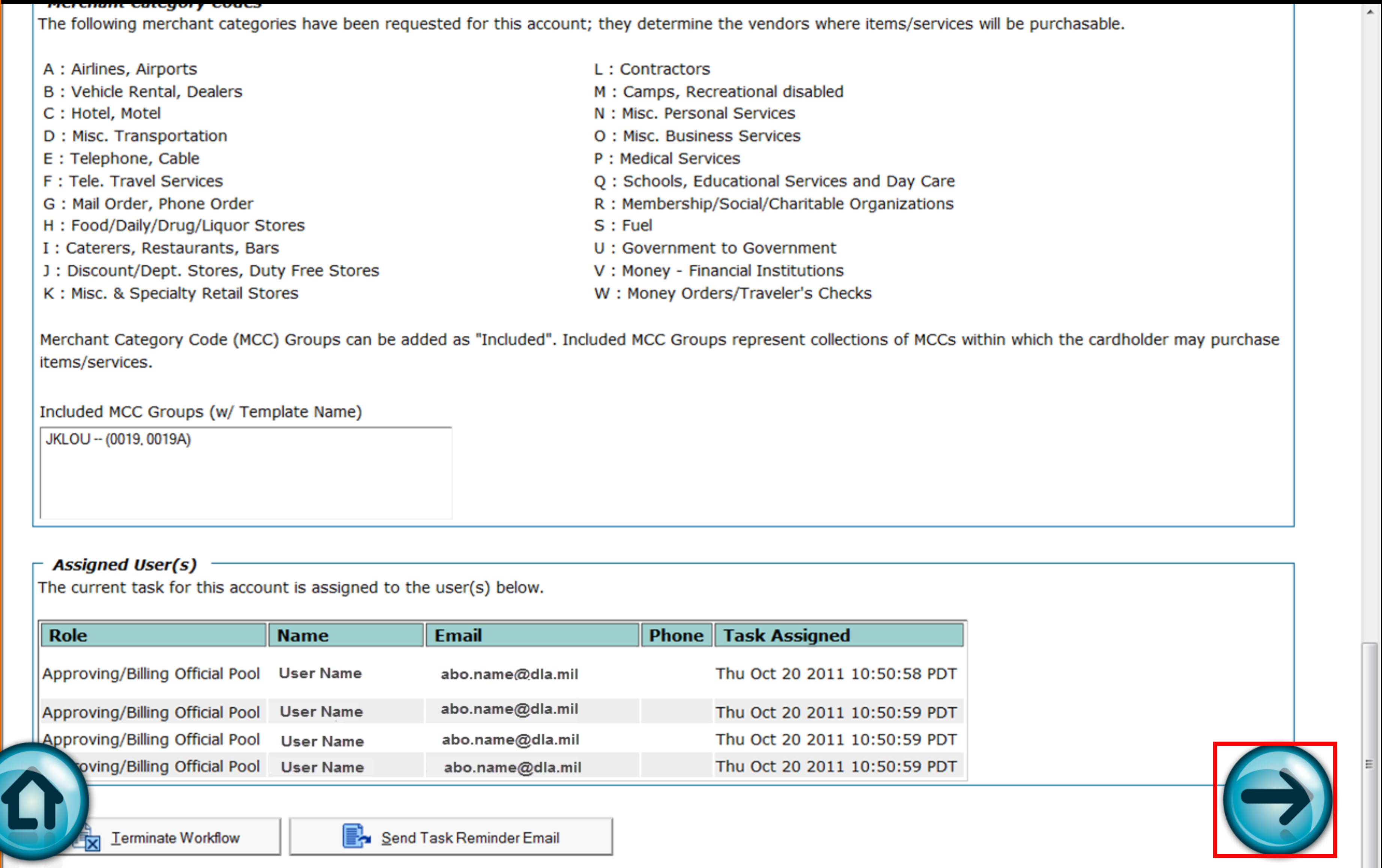
The following merchant categories have been requested for this account; they determine the vendors where items/services will be purchasable.

A : Airlines, Airports
B : Vehicle Rental, Dealers
C : Hotel, Motel
D : Misc. Transportation
: Telephone, Cable
ele. Travel Services
ail Order, Phone Order
od/Daily/Drug/Liquor Stores
aterers, Restaurants, Bars
: Discount/Dept. Stores, Duty Free Stores

L : Contractors
M : Camps, Recreational disabled
N : Misc. Personal Services
O : Misc. Business Services
P : Medical Services
Q : Schools, Educational Services and Day Care
R : Membership/Social/Charitable Organizations
S : Fuel
U : Government to Government
V : Money - Financial Institutions

## A/OPC Action 1 AIM: Initiate Request for New Cardholder Account

The A/OPC has the option to "Terminate Workflow" or "Send Task Reminder Email." Terminating a Workflow stops the current request. Send Task Reminder Email will resend the task email to the person that workflow is currently with. Click arrow to continue to the next step in the workflow.



***Merchant Category Codes***

The following merchant categories have been requested for this account; they determine the vendors where items/services will be purchasable.

A : Airlines, Airports
B : Vehicle Rental, Dealers
C : Hotel, Motel
D : Misc. Transportation
E : Telephone, Cable
F : Tele. Travel Services
G : Mail Order, Phone Order
H : Food/Daily/Drug/Liquor Stores
I : Caterers, Restaurants, Bars
J : Discount/Dept. Stores, Duty Free Stores
K : Misc. & Specialty Retail Stores
L : Contractors
M : Camps, Recreational disabled
N : Misc. Personal Services
O : Misc. Business Services
P : Medical Services
Q : Schools, Educational Services and Day Care
R : Membership/Social/Charitable Organizations
S : Fuel
U : Government to Government
V : Money - Financial Institutions
W : Money Orders/Traveler's Checks

Merchant Category Code (MCC) Groups can be added as "Included". Included MCC Groups represent collections of MCCs within which the cardholder may purchase items/services.

Included MCC Groups (w/ Template Name)

JKLOU -- (0019, 0019A)

***Assigned User(s)***

The current task for this account is assigned to the user(s) below.

| Role | Name | Email | Phone | Task Assigned |
|---|---|---|---|---|
| Approving/Billing Official Pool | User Name | abo.name@dla.mil | | Thu Oct 20 2011 10:50:58 PDT |
| Approving/Billing Official Pool | User Name | abo.name@dla.mil | | Thu Oct 20 2011 10:50:59 PDT |
| Approving/Billing Official Pool | User Name | abo.name@dla.mil | | Thu Oct 20 2011 10:50:59 PDT |
| oving/Billing Official Pool | User Name | abo.name@dla.mil | | Thu Oct 20 2011 10:50:59 PDT |

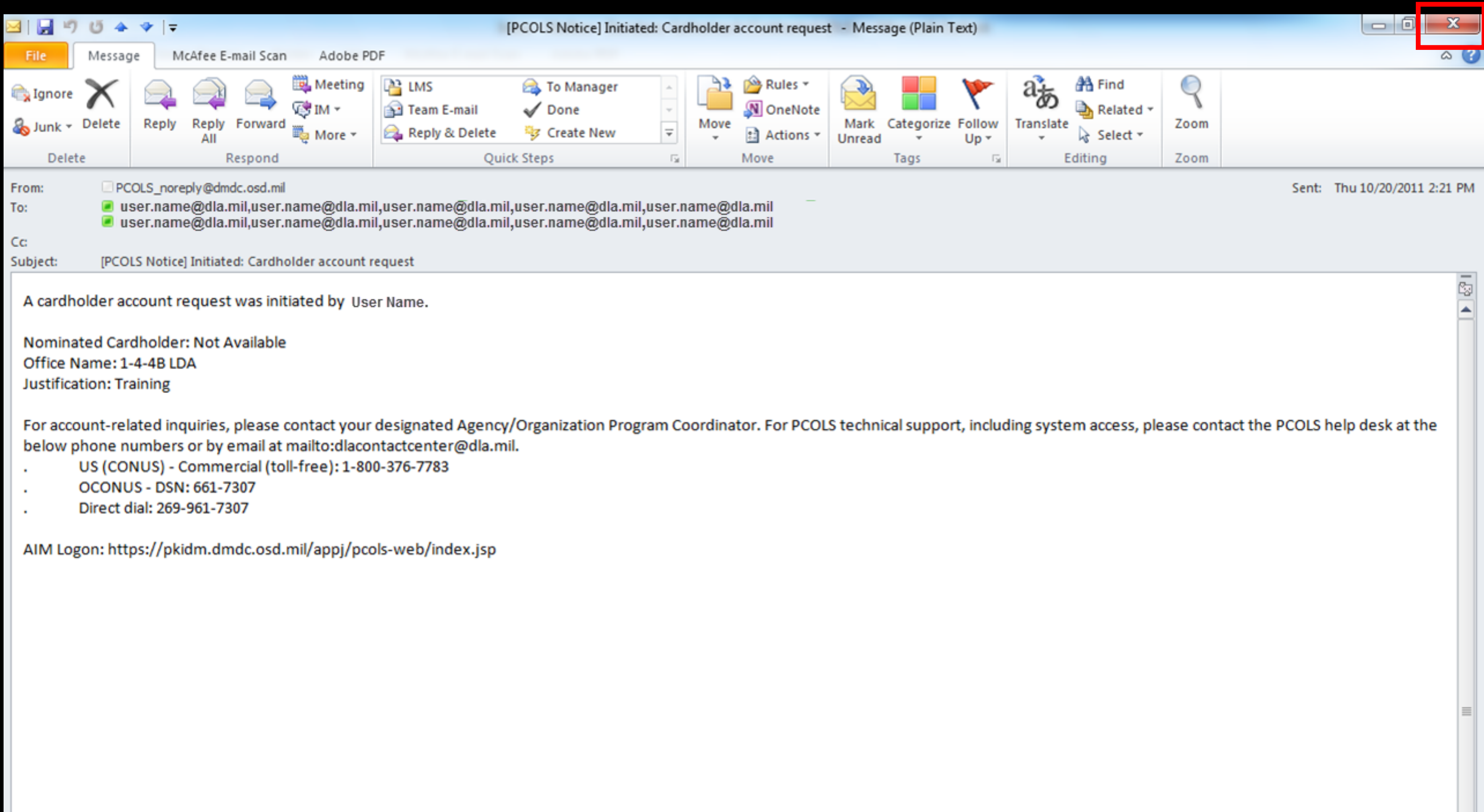
# A/OPC Action 1
Complete

# A/BO Action 1

# AIM: Verify and Approve the New Cardholder Account Request

# A/BO Action 1 AIM: Verify and Approve the New CA Request

All A/BOs that are associated with this account will receive a notification email that a cardholder account request was initiated. Click the “X” to see the next email.


File
Message
McAfee E-mail Scan
Adobe PDF
Ignore
Junk
Delete
Reply
Reply All
Forward
Meeting
IM
More
Respond
LMS
Team E-mail
Reply & Delete
To Manager
Done
Create New
Quick Steps
Move
Rules
OneNote
Actions
Mark Unread
Categorize
Follow Up
Tags
Translate
Find
Related
Select
Editing
Zoom

[PCOLS Notice] Initiated: Cardholder account request - Message (Plain Text)

From: PCOLS_noreply@dmdc.osd.mil
To: user.name@dla.mil,user.name@dla.mil,user.name@dla.mil,user.name@dla.mil,user.name@dla.mil
user.name@dla.mil,user.name@dla.mil,user.name@dla.mil,user.name@dla.mil,user.name@dla.mil
Cc:
Subject: [PCOLS Notice] Initiated: Cardholder account request
Sent: Thu 10/20/2011 2:21 PM

A cardholder account request was initiated by User Name.

Nominated Cardholder: Not Available
Office Name: 1-4-4B LDA
Justification: Training

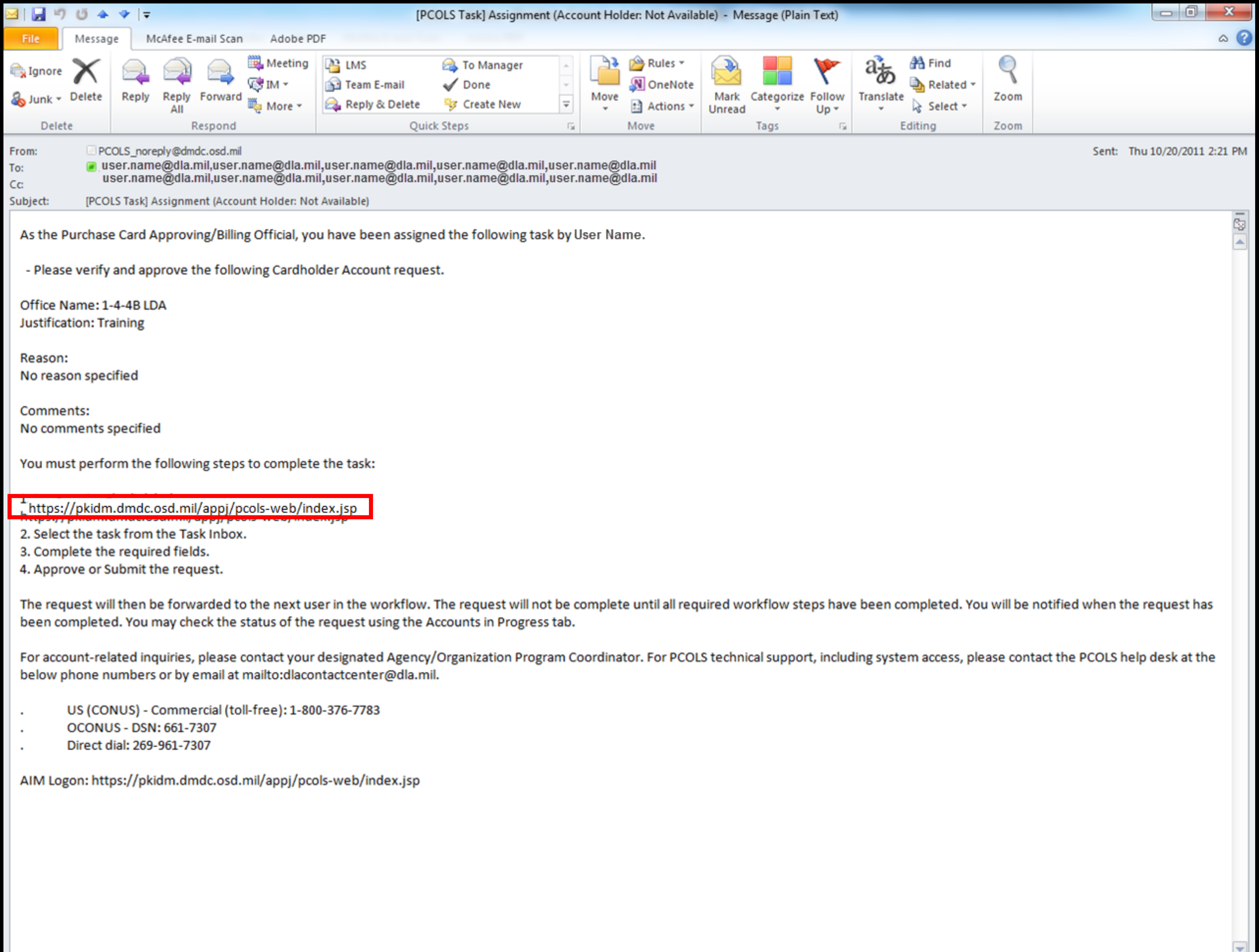
For account-related inquiries, please contact your designated Agency/Organization Program Coordinator. For PCOLS technical support, including system access, please contact the PCOLS help desk at the below phone numbers or by email at mailto:dlacontactcenter@dla.mil.

- US (CONUS) - Commercial (toll-free): 1-800-376-7783
- OCONUS - DSN: 661-7307
- Direct dial: 269-961-7307

AIM Logon: https://pkidm.dmdc.osd.mil/appj/pcols-web/index.jsp

# A/BO Action 1 AIM: Verify and Approve the New CA Request

The A/BO has received a PCOLS Task email to “verify and approve the following Cardholder account request.” Click on the link to complete the task.


[PCOLS Task] Assignment (Account Holder: Not Available) - Message (Plain Text)
File
Message
McAfee E-mail Scan
Adobe PDF
Ignore
Junk
Delete
Reply
Reply All
Forward
Meeting
IM
More
Respond
LMS
Team E-mail
Reply & Delete
To Manager
Done
Create New
Quick Steps
Move
Rules
OneNote
Actions
Mark Unread
Categorize
Follow Up
Tags
Translate
Find
Related
Select
Editing
Zoom

From: PCOLS_noreply@dmdc.osd.mil

Sent: Thu 10/20/2011 2:21 PM

To: user.name@dla.mil,user.name@dla.mil,user.name@dla.mil,user.name@dla.mil,user.name@dla.mil user.name@dla.mil,user.name@dla.mil,user.name@dla.mil,user.name@dla.mil,user.name@dla.mil

Cc:

Subject: [PCOLS Task] Assignment (Account Holder: Not Available)

As the Purchase Card Approving/Billing Official, you have been assigned the following task by User Name.

- Please verify and approve the following Cardholder Account request.

Office Name: 1-4-4B LDA
Justification: Training

Reason:
No reason specified

Comments:
No comments specified

You must perform the following steps to complete the task:

https://pkidm.dmdc.osd.mil/appj/pcols-web/index.jsp
2. Select the task from the Task Inbox.
3. Complete the required fields.
4. Approve or Submit the request.

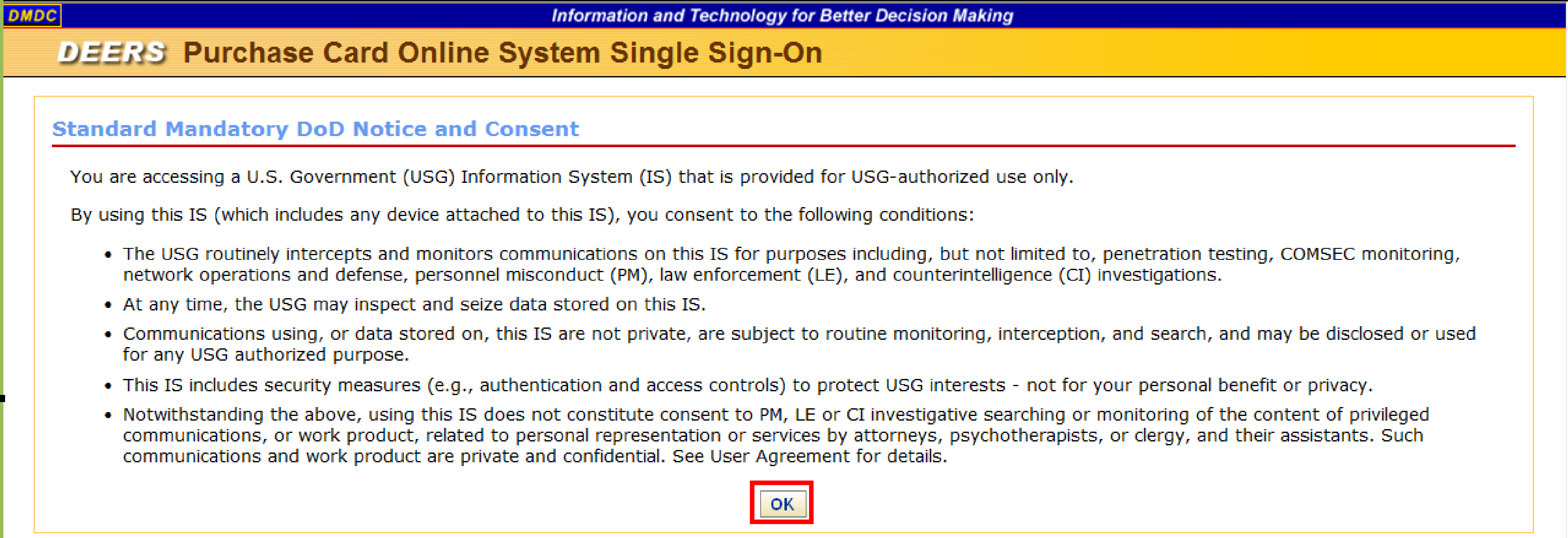
The request will then be forwarded to the next user in the workflow. The request will not be complete until all required workflow steps have been completed. You will be notified when the request has been completed. You may check the status of the request using the Accounts in Progress tab.

For account-related inquiries, please contact your designated Agency/Organization Program Coordinator. For PCOLS technical support, including system access, please contact the PCOLS help desk at the below phone numbers or by email at mailto:dlacontactcenter@dla.mil.

- US (CONUS) - Commercial (toll-free): 1-800-376-7783
- OCONUS - DSN: 661-7307
- Direct dial: 269-961-7307

AIM Logon: https://pkidm.dmdc.osd.mil/appj/pcols-web/index.jsp

# Click the “OK” button.


DMDC
Information and Technology for Better Decision Making
DEERS Purchase Card Online System Single Sign-On

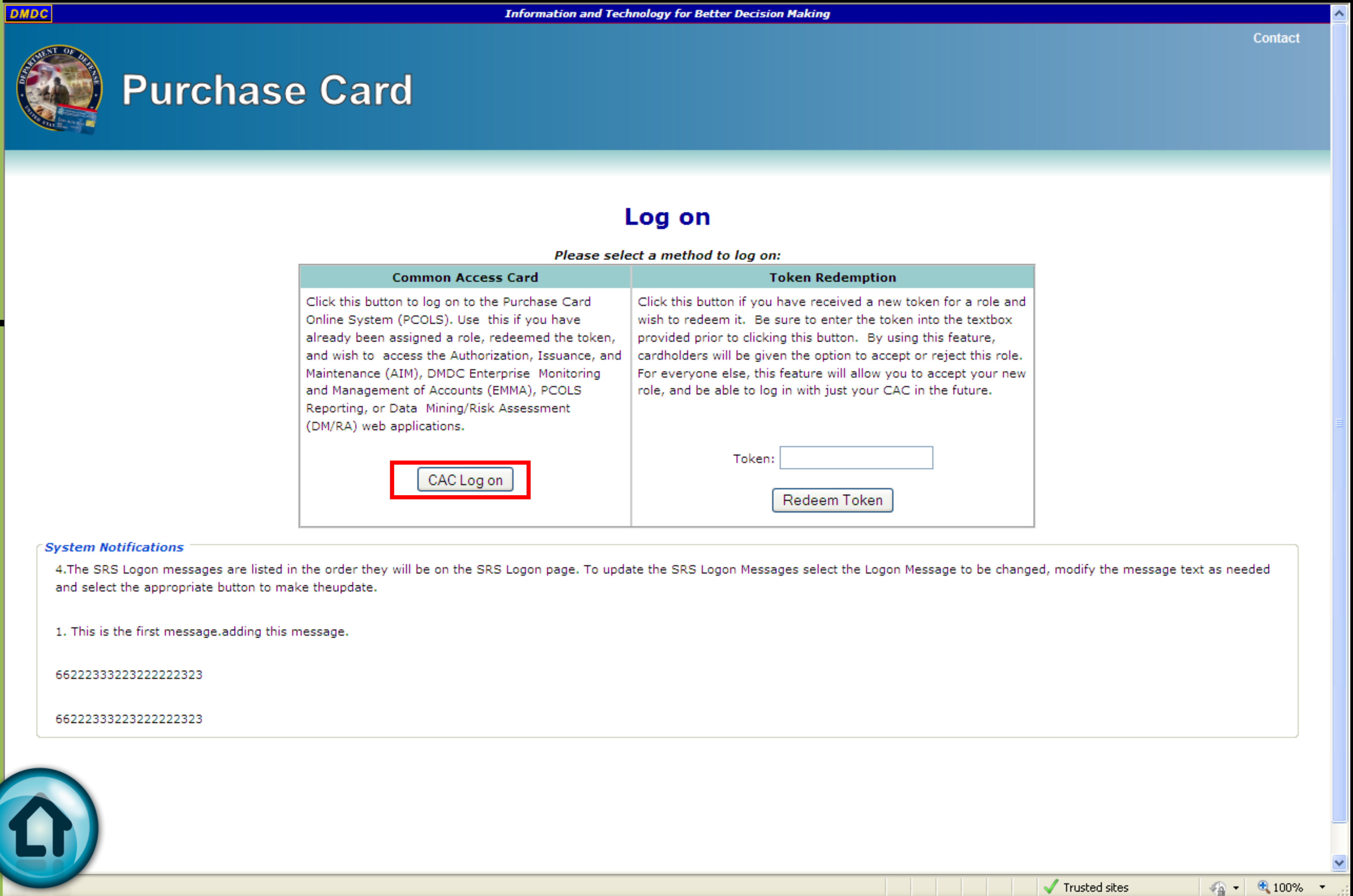
**Standard Mandatory DoD Notice and Consent**

You are accessing a U.S. Government (USG) Information System (IS) that is provided for USG-authorized use only.

By using this IS (which includes any device attached to this IS), you consent to the following conditions:

- The USG routinely intercepts and monitors communications on this IS for purposes including, but not limited to, penetration testing, COMSEC monitoring, network operations and defense, personnel misconduct (PM), law enforcement (LE), and counterintelligence (CI) investigations.
- At any time, the USG may inspect and seize data stored on this IS.
- Communications using, or data stored on, this IS are not private, are subject to routine monitoring, interception, and search, and may be disclosed or used for any USG authorized purpose.
- This IS includes security measures (e.g., authentication and access controls) to protect USG interests - not for your personal benefit or privacy.
- Notwithstanding the above, using this IS does not constitute consent to PM, LE or CI investigative searching or monitoring of the content of privileged communications, or work product, related to personal representation or services by attorneys, psychotherapists, or clergy, and their assistants. Such communications and work product are private and confidential. See User Agreement for details.

# Click the “CAC Log on” button



## Log on

*Please select a method to log on:*

| Common Access Card | Token Redemption |
|---|---|
| Click this button to log on to the Purchase Card Online System (PCOLS). Use this if you have already been assigned a role, redeemed the token, and wish to access the Authorization, Issuance, and Maintenance (AIM), DMDC Enterprise Monitoring and Management of Accounts (EMMA), PCOLS Reporting, or Data Mining/Risk Assessment (DM/RA) web applications. | Click this button if you have received a new token for a role and wish to redeem it. Be sure to enter the token into the textbox provided prior to clicking this button. By using this feature, cardholders will be given the option to accept or reject this role. For everyone else, this feature will allow you to accept your new role, and be able to log in with just your CAC in the future. |

***System Notifications***

4.The SRS Logon messages are listed in the order they will be on the SRS Logon page. To update the SRS Logon Messages select the Logon Message to be changed, modify the message text as needed and select the appropriate button to make theupdate.

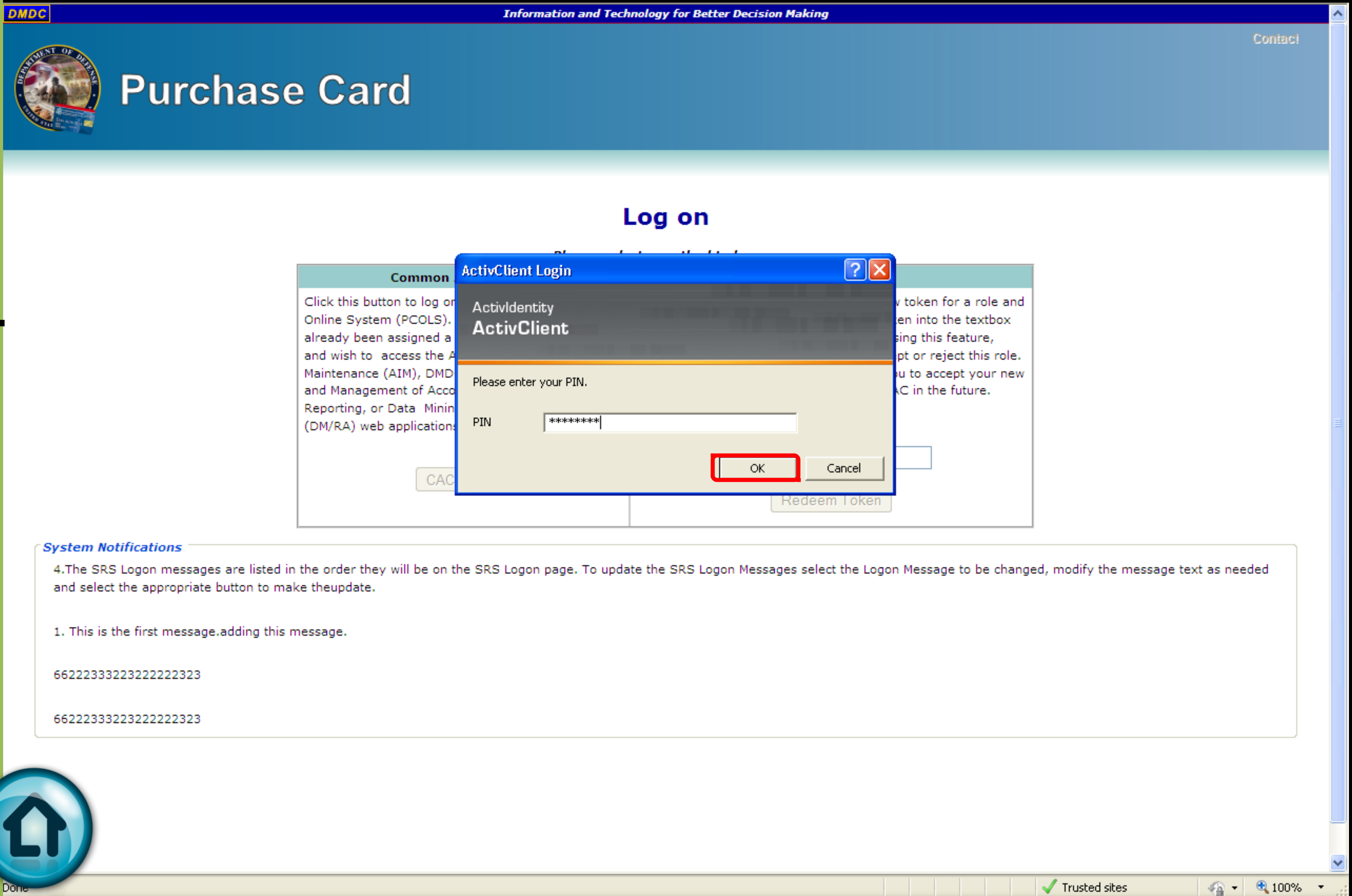
1. This is the first message.adding this message.

66222333223222222323

66222333223222222323

A/BO Action 1 AIM: Verify and Approve the New CA Request

# The A/BO enters their PIN.  Click the “OK” button.


DMDC
Information and Technology for Better Decision Making
Contact
Purchase Card
Log on
ActivClient Login
ActivIdentity
ActivClient
OK
Cancel
CAC
Redeem Token
System Notifications
Done
Trusted sites
100%

Please enter your PIN.

PIN ********

4.The SRS Logon messages are listed in the order they will be on the SRS Logon page. To update the SRS Logon Messages select the Logon Message to be changed, modify the message text as needed and select the appropriate button to make theupdate.

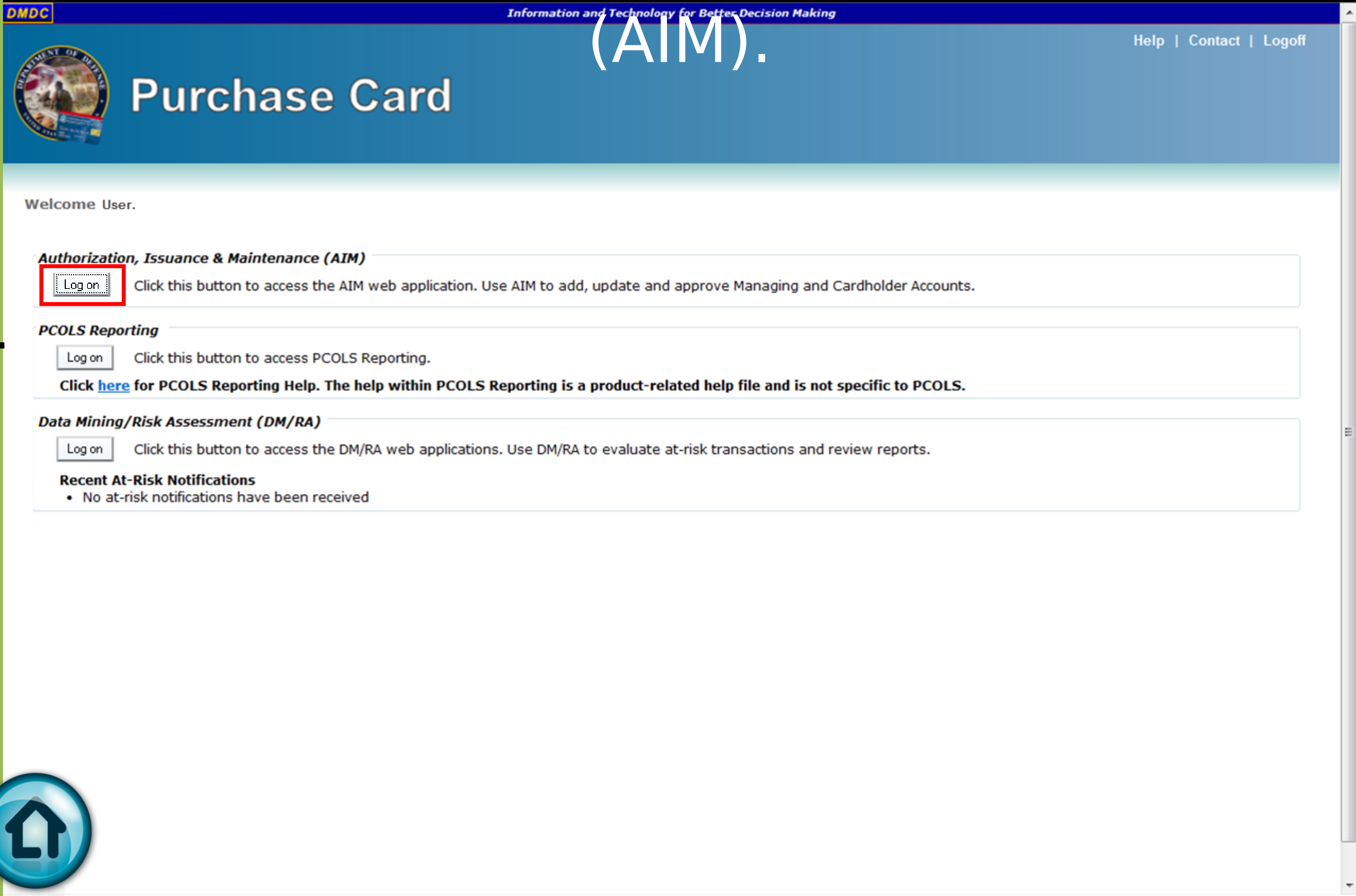
1. This is the first message.adding this message.

66222333223222222323

66222333223222222323

# Click on the “Log on” button for Authorization, Issuance & Maintenance (AIM).

A/BO Action 1 - AIM: Verify and Approve the New CA Request


DMDC
Information and Technology for Better Decision Making
Help | Contact | Logoff
Purchase Card

Welcome User.

**Authorization, Issuance & Maintenance (AIM)**

Log on Click this button to access the AIM web application. Use AIM to add, update and approve Managing and Cardholder Accounts.

**PCOLS Reporting**

Log on Click this button to access PCOLS Reporting.

**Click here for PCOLS Reporting Help. The help within PCOLS Reporting is a product-related help file and is not specific to PCOLS.**

**Data Mining/Risk Assessment (DM/RA)**

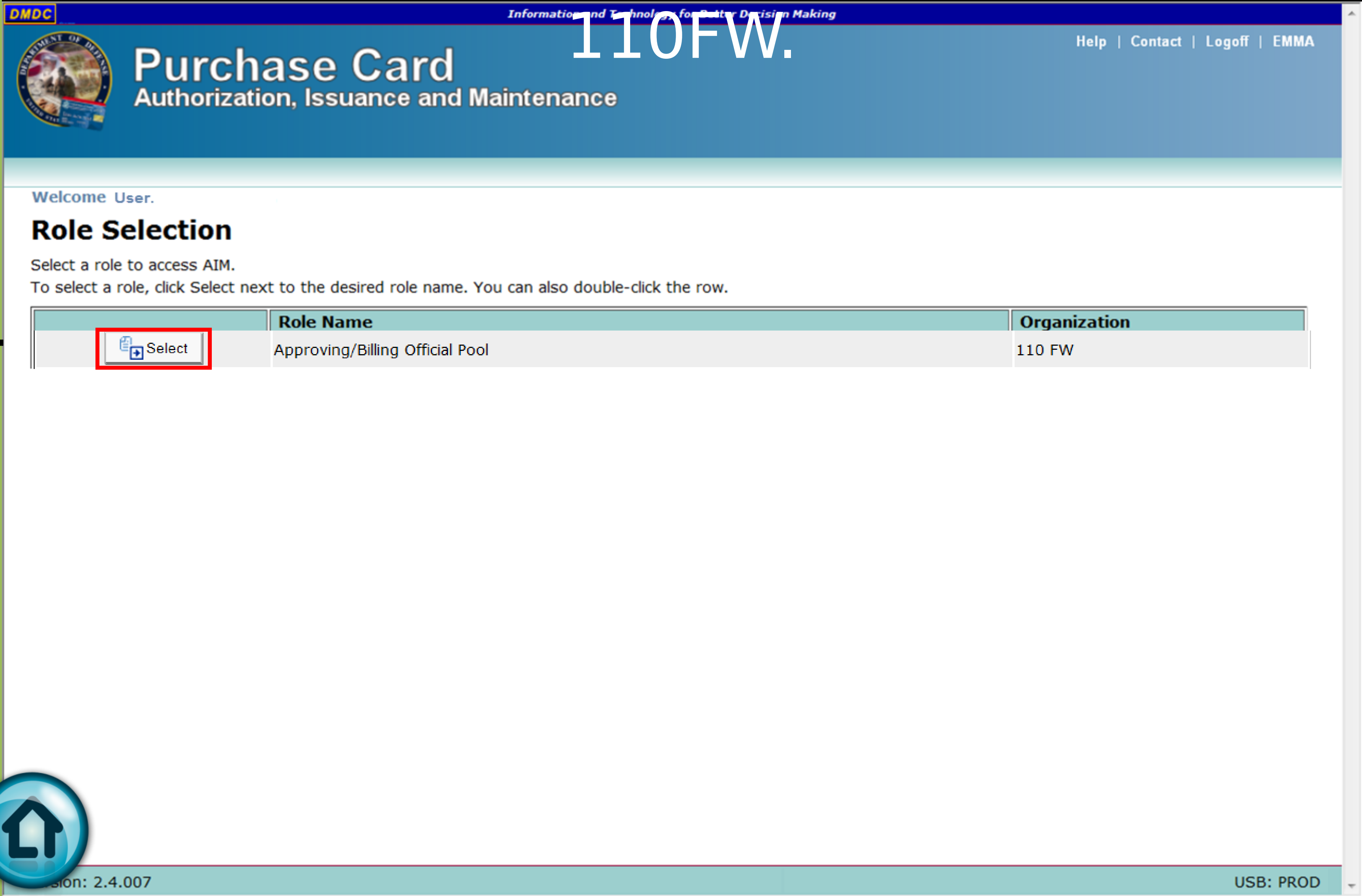
Log on Click this button to access the DM/RA web applications. Use DM/RA to evaluate at-risk transactions and review reports.

**Recent At-Risk Notifications**

- No at-risk notifications have been received

A/BO Action 1 AIM: Verify and Approve the New CA Request

# Click the “Select” button for the Approving/Billing Official Pool role for 110FW.



DMDC
Information and Technology for Better Decision Making
Purchase Card
Authorization, Issuance and Maintenance
Help | Contact | Logoff | EMMA

Welcome User.

## Role Selection

Select a role to access AIM.

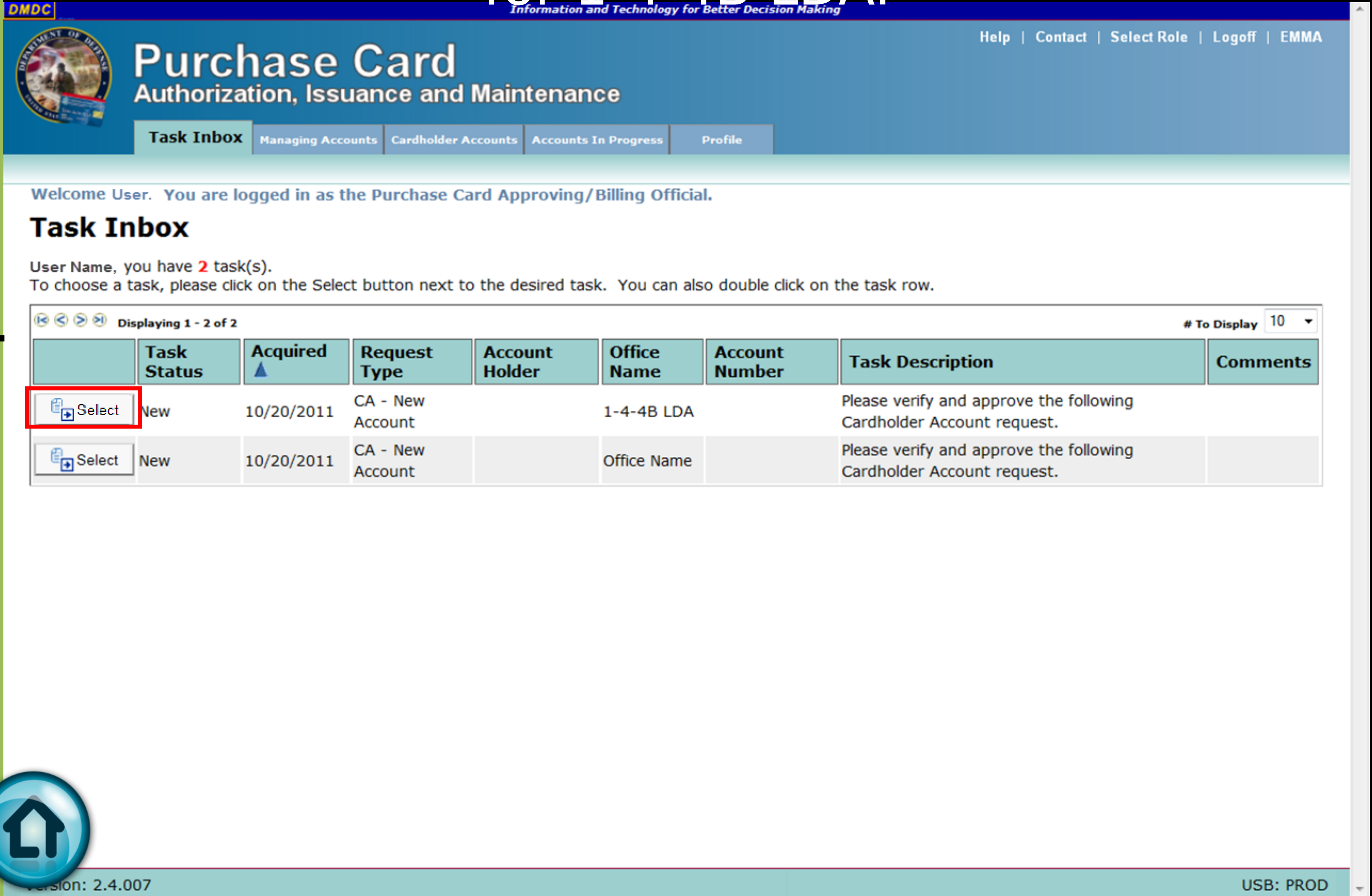
To select a role, click Select next to the desired role name. You can also double-click the row.

| | Role Name | Organization |
|---|---|---|
| Select | Approving/Billing Official Pool | 110 FW |

sion: 2.4.007

USB: PROD

# The A/BO has been directed to their Task Inbox. Click on the "Select" button to view the new task for 1-4-4B LDA.


DMDC
Information and Technology for Better Decision Making
Help | Contact | Select Role | Logoff | EMMA
Purchase Card
Authorization, Issuance and Maintenance
Task Inbox
Managing Accounts
Cardholder Accounts
Accounts In Progress
Profile

Welcome User. You are logged in as the Purchase Card Approving/Billing Official.

## Task Inbox

User Name, you have 2 task(s).
To choose a task, please click on the Select button next to the desired task. You can also double click on the task row.

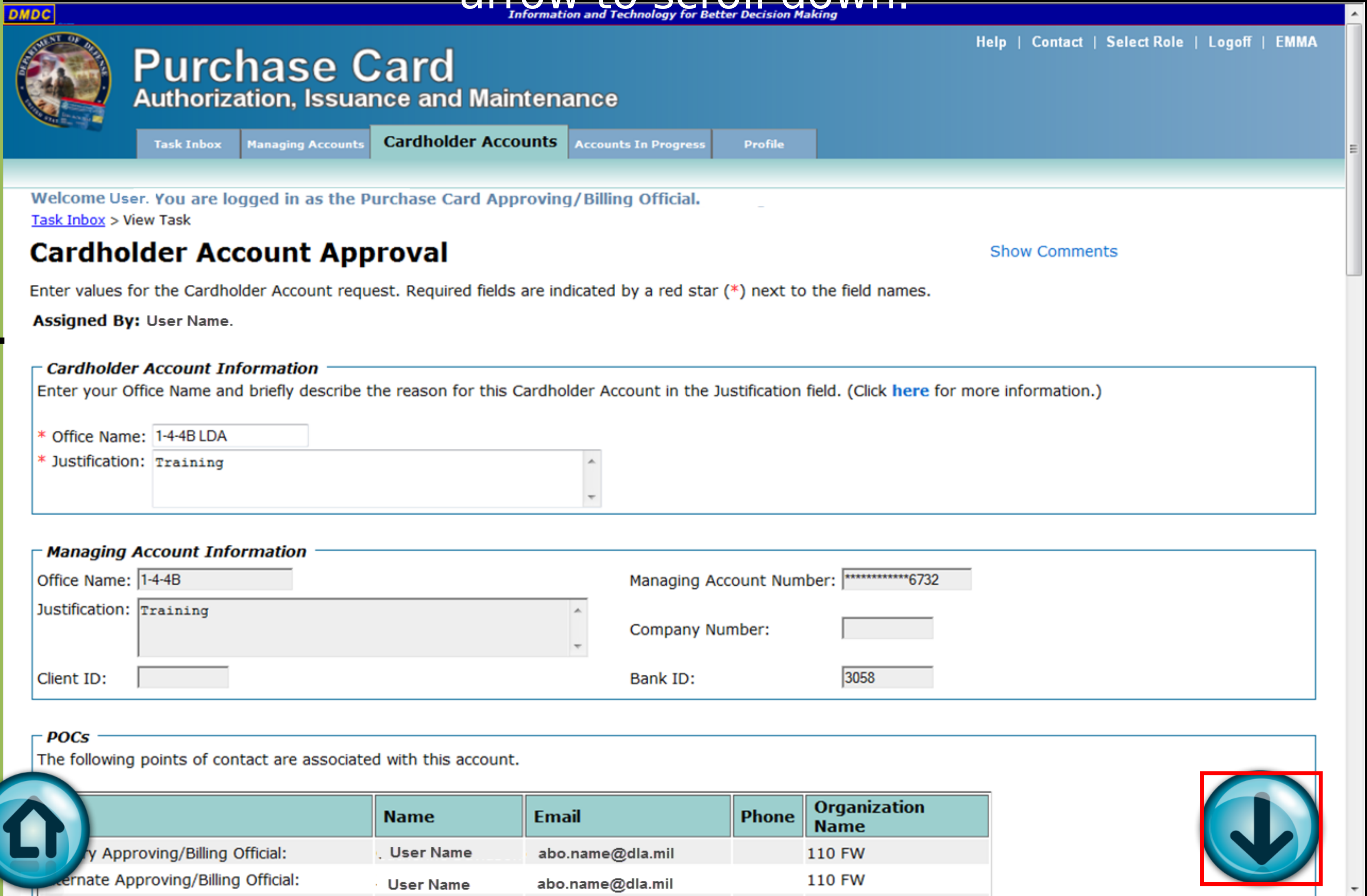
Displaying 1 - 2 of 2 # To Display 10

| | Task Status | Acquired | Request Type | Account Holder | Office Name | Account Number | Task Description | Comments |
|---|---|---|---|---|---|---|---|---|
| Select | New | 10/20/2011 | CA - New Account | | 1-4-4B LDA | | Please verify and approve the following Cardholder Account request. | |
| Select | New | 10/20/2011 | CA - New Account | | Office Name | | Please verify and approve the following Cardholder Account request. | |

Version: 2.4.007 USB: PROD

## A/BO Action 1 AIM: Verify and Approve the New CA Request

The A/OPC has completed the Office Name and Justification fields. If these were blank, the A/BO would be required to enter the information. Fields with a (*) are required. Click the arrow to scroll down.



DMDC
Information and Technology for Better Decision Making
Help | Contact | Select Role | Logoff | EMMA
Purchase Card
Authorization, Issuance and Maintenance
Task Inbox
Managing Accounts
Cardholder Accounts
Accounts In Progress
Profile

Welcome User. You are logged in as the Purchase Card Approving/Billing Official.

Task Inbox > View Task

### Cardholder Account Approval

Show Comments

Enter values for the Cardholder Account request. Required fields are indicated by a red star (*) next to the field names.

**Assigned By:** User Name.

***Cardholder Account Information***

Enter your Office Name and briefly describe the reason for this Cardholder Account in the Justification field. (Click here for more information.)

* Office Name: 1-4-4B LDA

* Justification: Training

***Managing Account Information***

Office Name: 1-4-4B

Justification: Training

Client ID:

Managing Account Number: ************6732

Company Number:

Bank ID: 3058

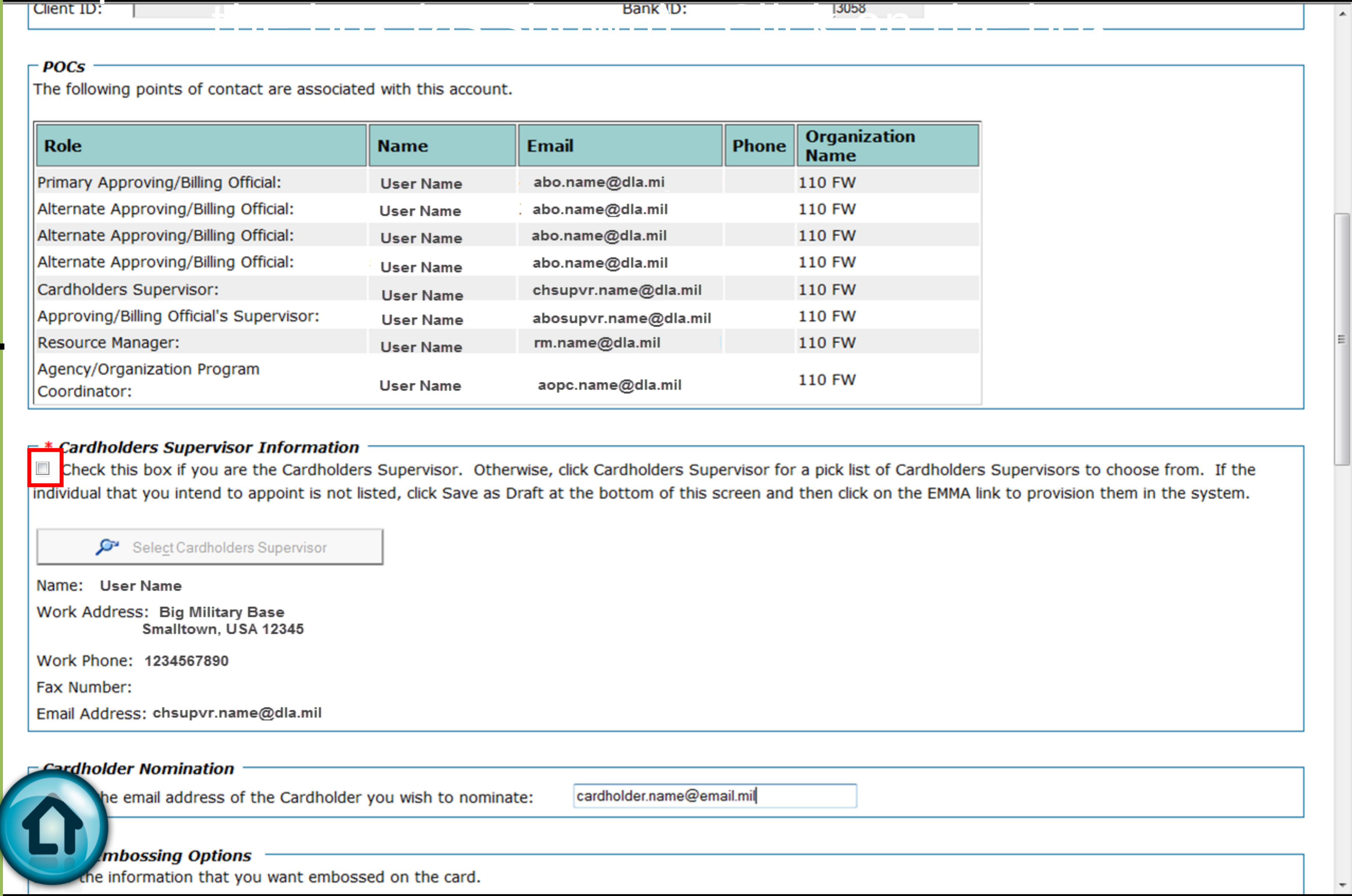
***POCs***

The following points of contact are associated with this account.

| | Name | Email | Phone | Organization Name |
|---|---|---|---|---|
| y Approving/Billing Official: | User Name | abo.name@dla.mil | | 110 FW |
| ernate Approving/Billing Official: | User Name | abo.name@dla.mil | | 110 FW |

# A/BO Action 1 AIM: Verify and Approve the New CA Request

# The A/OPC has selected the Cardholders Supervisor for this account. If the A/BO and the Cardholders Supervisor are the same user, the A/BO would check



Client ID: Bank ID: 3058

***POCs***

The following points of contact are associated with this account.

| Role | Name | Email | Phone | Organization Name |
|---|---|---|---|---|
| Primary Approving/Billing Official: | User Name | abo.name@dla.mi | | 110 FW |
| Alternate Approving/Billing Official: | User Name | abo.name@dla.mil | | 110 FW |
| Alternate Approving/Billing Official: | User Name | abo.name@dla.mil | | 110 FW |
| Alternate Approving/Billing Official: | User Name | abo.name@dla.mil | | 110 FW |
| Cardholders Supervisor: | User Name | chsupvr.name@dla.mil | | 110 FW |
| Approving/Billing Official's Supervisor: | User Name | abosupvr.name@dla.mil | | 110 FW |
| Resource Manager: | User Name | rm.name@dla.mil | | 110 FW |
| Agency/Organization Program Coordinator: | User Name | aopc.name@dla.mil | | 110 FW |

**** Cardholders Supervisor Information***

☐ Check this box if you are the Cardholders Supervisor. Otherwise, click Cardholders Supervisor for a pick list of Cardholders Supervisors to choose from. If the individual that you intend to appoint is not listed, click Save as Draft at the bottom of this screen and then click on the EMMA link to provision them in the system.

Name: **User Name**

Work Address: **Big Military Base**
**Smalltown, USA 12345**

Work Phone: **1234567890**

Fax Number:

Email Address: **chsupvr.name@dla.mil**

***ardholder Nomination***

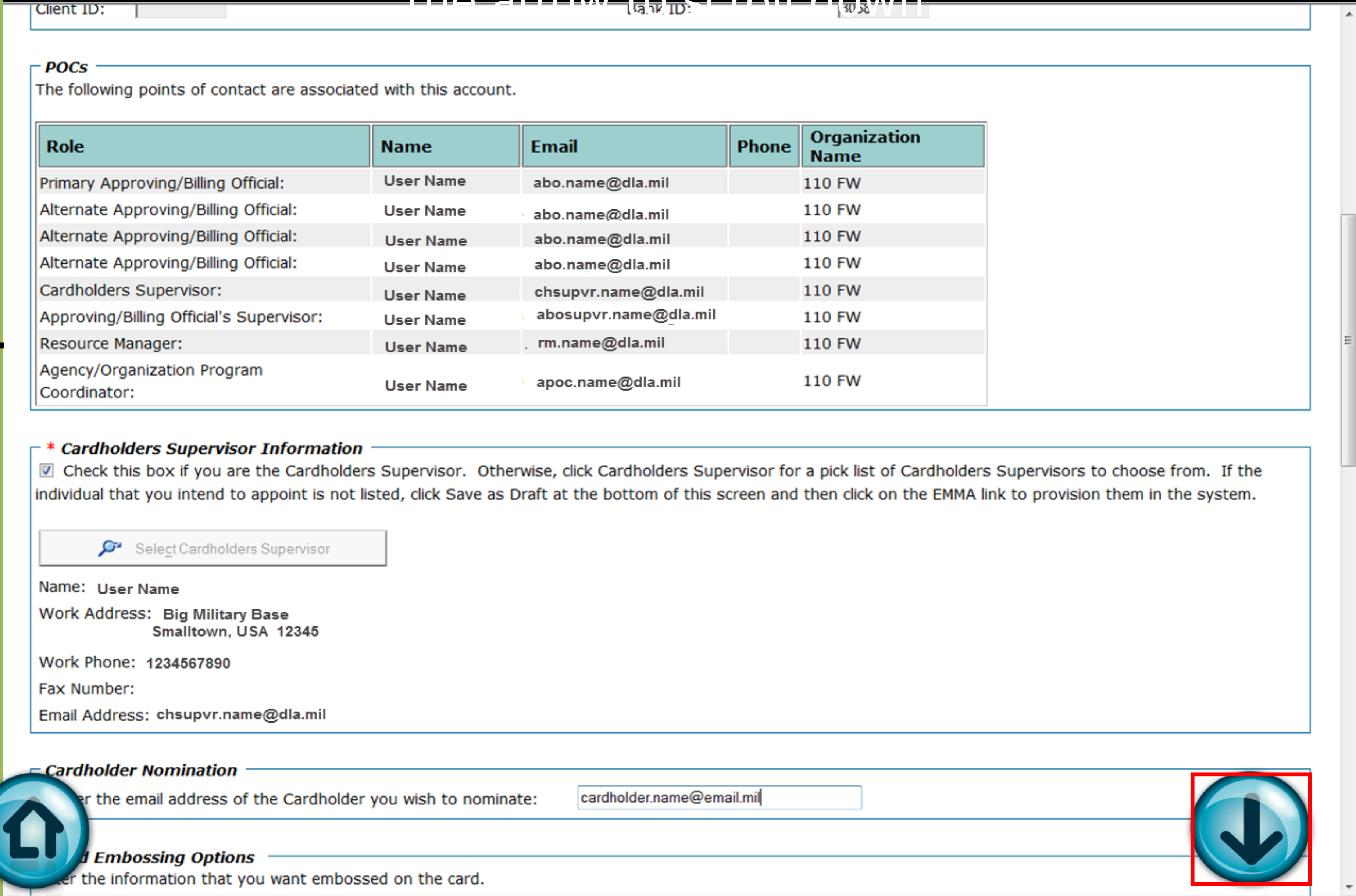
he email address of the Cardholder you wish to nominate: cardholder.name@email.mil

***mbossing Options***

the information that you want embossed on the card.

A/BO Action 1 AIM: Verify and Approve the New CA Request

The A/OPC has selected the Cardholders Supervisor for this account. If the A/BO and the Cardholders Supervisor is the same user, the A/BO would check the box (as shown). Click the arrow to scroll down



Client ID: Bank ID:

**POCs**

The following points of contact are associated with this account.

| Role | Name | Email | Phone | Organization Name |
|---|---|---|---|---|
| Primary Approving/Billing Official: | User Name | abo.name@dla.mil | | 110 FW |
| Alternate Approving/Billing Official: | User Name | abo.name@dla.mil | | 110 FW |
| Alternate Approving/Billing Official: | User Name | abo.name@dla.mil | | 110 FW |
| Alternate Approving/Billing Official: | User Name | abo.name@dla.mil | | 110 FW |
| Cardholders Supervisor: | User Name | chsupvr.name@dla.mil | | 110 FW |
| Approving/Billing Official's Supervisor: | User Name | abosupvr.name@dla.mil | | 110 FW |
| Resource Manager: | User Name | rm.name@dla.mil | | 110 FW |
| Agency/Organization Program Coordinator: | User Name | apoc.name@dla.mil | | 110 FW |

*** Cardholders Supervisor Information**

☑ Check this box if you are the Cardholders Supervisor. Otherwise, click Cardholders Supervisor for a pick list of Cardholders Supervisors to choose from. If the individual that you intend to appoint is not listed, click Save as Draft at the bottom of this screen and then click on the EMMA link to provision them in the system.

Name: User Name

Work Address: Big Military Base
Smalltown, USA 12345

Work Phone: 1234567890

Fax Number:

Email Address: chsupvr.name@dla.mil

**Cardholder Nomination**

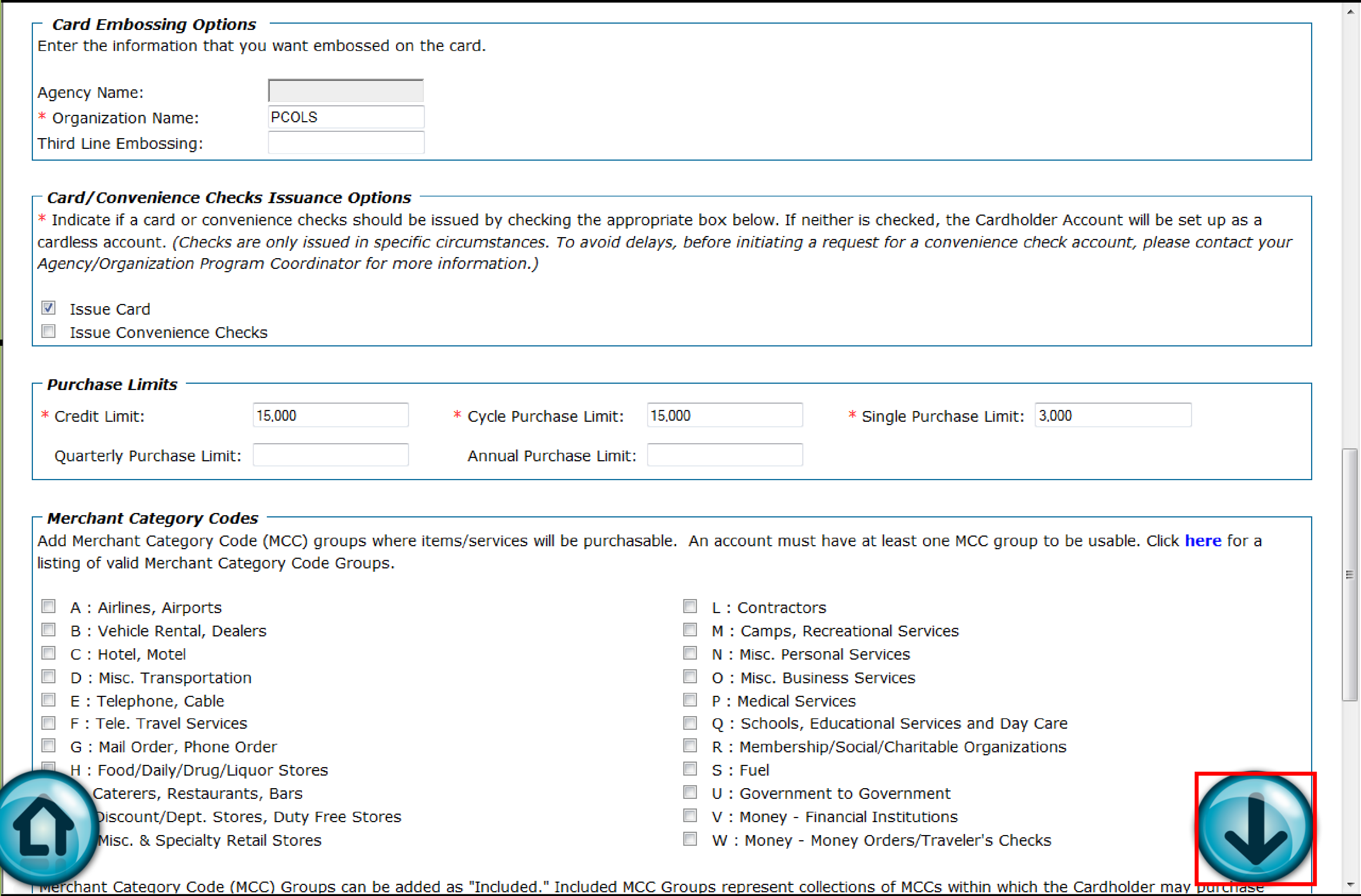
r the email address of the Cardholder you wish to nominate: cardholder.name@email.mil

**d Embossing Options**

er the information that you want embossed on the card.

# A/BO Action 1 - AIM: Verify and Approve the New CA Request

The A/OPC has completed the **Organization Name, Card/Convenience Check Issuance Options,** and **Purchase Limits** fields. If these were blank, the A/BO would be required to enter the information Click the arrow to scroll down.



***Card Embossing Options***

Enter the information that you want embossed on the card.

Agency Name:
* Organization Name: PCOLS
Third Line Embossing:

***Card/Convenience Checks Issuance Options***

* Indicate if a card or convenience checks should be issued by checking the appropriate box below. If neither is checked, the Cardholder Account will be set up as a cardless account. *(Checks are only issued in specific circumstances. To avoid delays, before initiating a request for a convenience check account, please contact your Agency/Organization Program Coordinator for more information.)*

☑ Issue Card
☐ Issue Convenience Checks

***Purchase Limits***

* Credit Limit: 15,000
* Cycle Purchase Limit: 15,000
* Single Purchase Limit: 3,000
Quarterly Purchase Limit:
Annual Purchase Limit:

***Merchant Category Codes***

Add Merchant Category Code (MCC) groups where items/services will be purchasable. An account must have at least one MCC group to be usable. Click here for a listing of valid Merchant Category Code Groups.

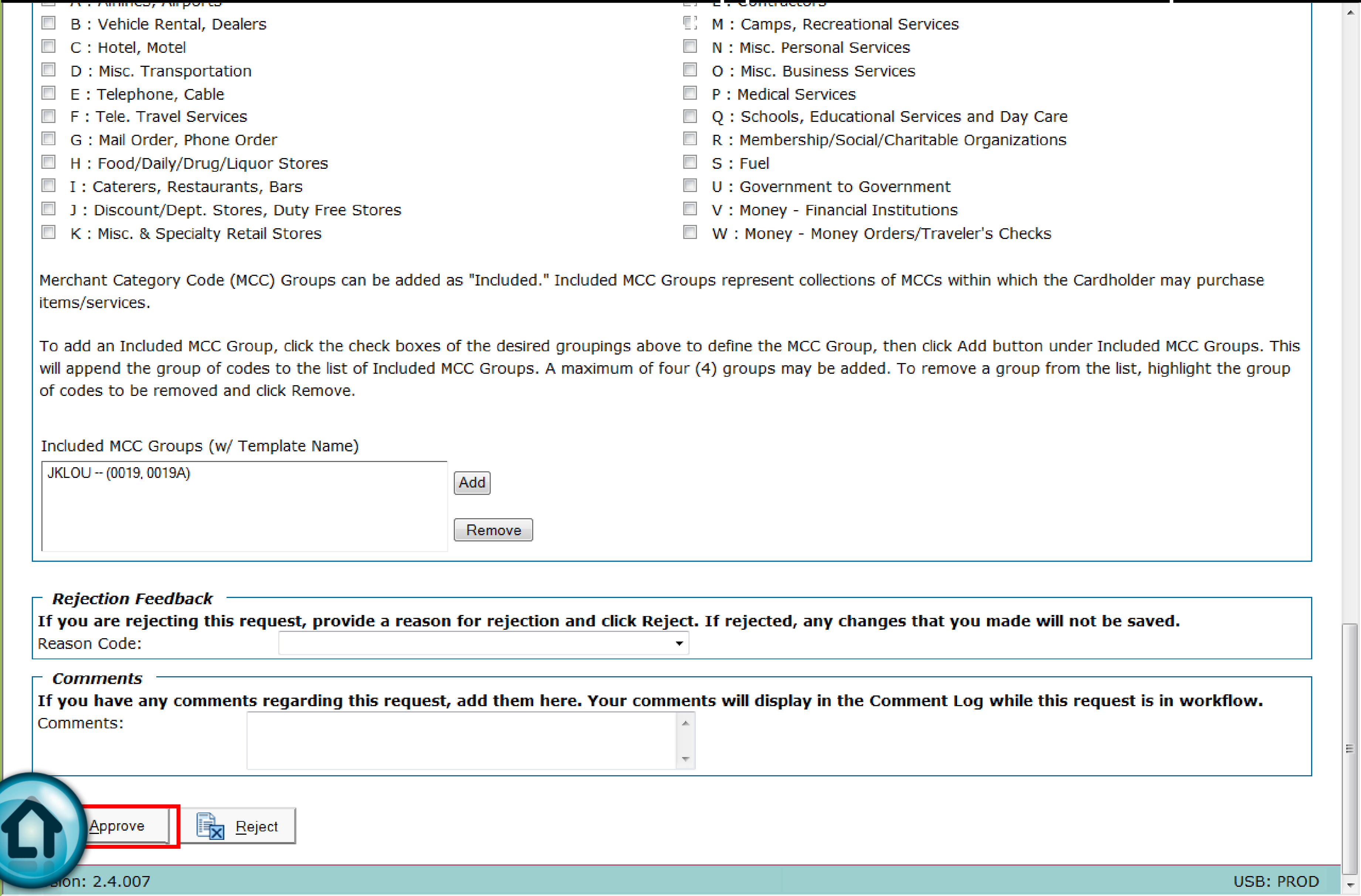
☐ A : Airlines, Airports
☐ B : Vehicle Rental, Dealers
☐ C : Hotel, Motel
☐ D : Misc. Transportation
☐ E : Telephone, Cable
☐ F : Tele. Travel Services
☐ G : Mail Order, Phone Order
☐ H : Food/Daily/Drug/Liquor Stores
Caterers, Restaurants, Bars
Discount/Dept. Stores, Duty Free Stores
Misc. & Specialty Retail Stores

☐ L : Contractors
☐ M : Camps, Recreational Services
☐ N : Misc. Personal Services
☐ O : Misc. Business Services
☐ P : Medical Services
☐ Q : Schools, Educational Services and Day Care
☐ R : Membership/Social/Charitable Organizations
☐ S : Fuel
☐ U : Government to Government
☐ V : Money - Financial Institutions
☐ W : Money - Money Orders/Traveler's Checks

Merchant Category Code (MCC) Groups can be added as "Included." Included MCC Groups represent collections of MCCs within which the Cardholder may purchase

## A/BO Action 1 - AIM: Verify and Approve the New CA Request

The A/OPC has completed the **Merchant Category Codes (MCC)** section. If these were blank, the A/BO would NOT be required to enter the information. The A/BO has confirmed the information for this account is correct. Click the “Approve” button to complete the



- ☐ A : Airlines, Airports
- ☐ B : Vehicle Rental, Dealers
- ☐ C : Hotel, Motel
- ☐ D : Misc. Transportation
- ☐ E : Telephone, Cable
- ☐ F : Tele. Travel Services
- ☐ G : Mail Order, Phone Order
- ☐ H : Food/Daily/Drug/Liquor Stores
- ☐ I : Caterers, Restaurants, Bars
- ☐ J : Discount/Dept. Stores, Duty Free Stores
- ☐ K : Misc. & Specialty Retail Stores
- ☐ L : Contractors
- ☐ M : Camps, Recreational Services
- ☐ N : Misc. Personal Services
- ☐ O : Misc. Business Services
- ☐ P : Medical Services
- ☐ Q : Schools, Educational Services and Day Care
- ☐ R : Membership/Social/Charitable Organizations
- ☐ S : Fuel
- ☐ U : Government to Government
- ☐ V : Money - Financial Institutions
- ☐ W : Money - Money Orders/Traveler's Checks

Merchant Category Code (MCC) Groups can be added as "Included." Included MCC Groups represent collections of MCCs within which the Cardholder may purchase items/services.

To add an Included MCC Group, click the check boxes of the desired groupings above to define the MCC Group, then click Add button under Included MCC Groups. This will append the group of codes to the list of Included MCC Groups. A maximum of four (4) groups may be added. To remove a group from the list, highlight the group of codes to be removed and click Remove.

Included MCC Groups (w/ Template Name)

JKLOU -- (0019, 0019A)

***Rejection Feedback***

**If you are rejecting this request, provide a reason for rejection and click Reject. If rejected, any changes that you made will not be saved.**

Reason Code:

***Comments***

**If you have any comments regarding this request, add them here. Your comments will display in the Comment Log while this request is in workflow.**

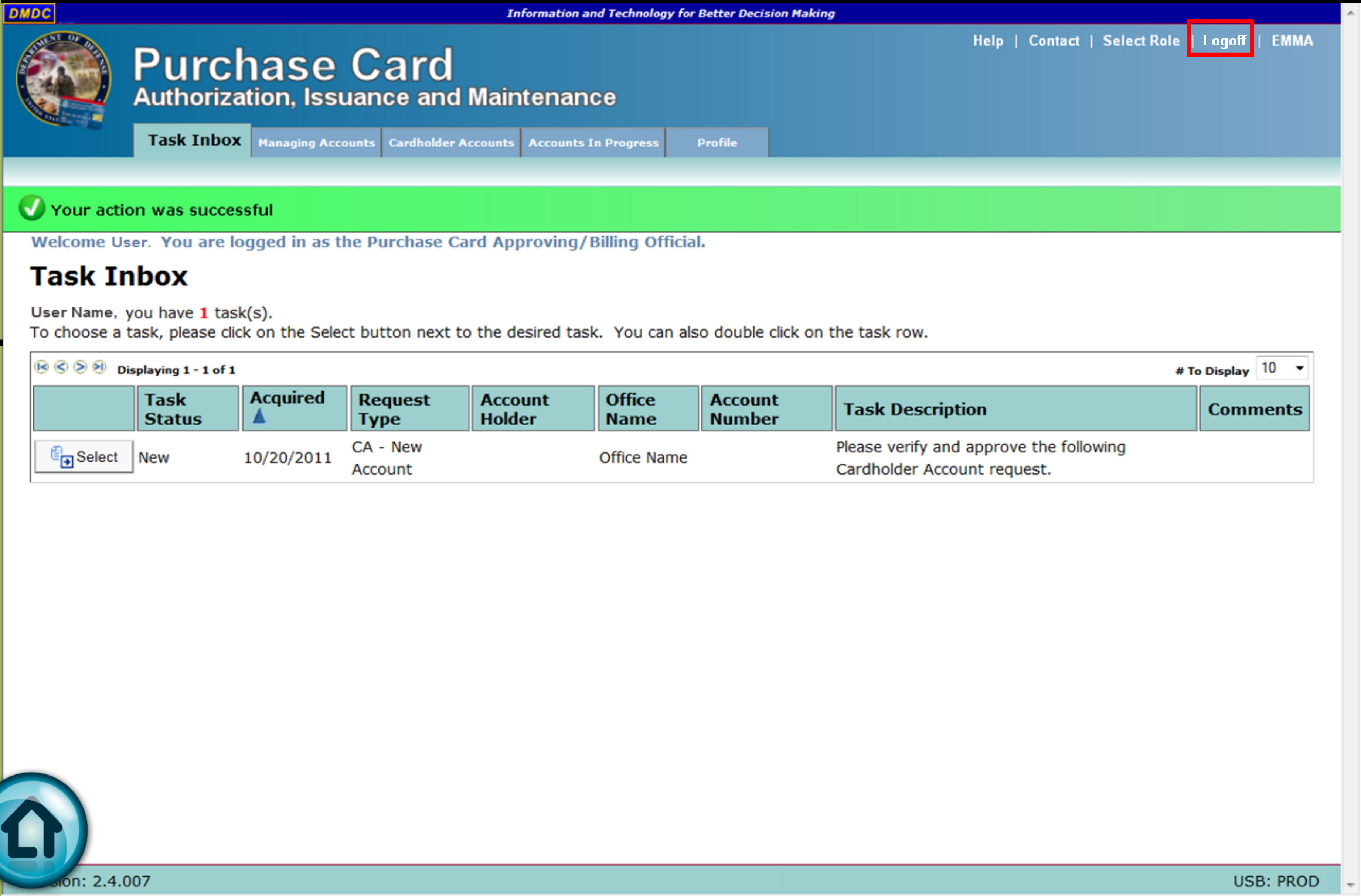
Comments:

sion: 2.4.007

USB: PROD

A/BO Action 1 AIM: Verify and Approve the New CA Request

# The action was successful. Click the “Logoff” link.


DMDC
Information and Technology for Better Decision Making
Help | Contact | Select Role | Logoff | EMMA
Purchase Card
Authorization, Issuance and Maintenance
Task Inbox
Managing Accounts
Cardholder Accounts
Accounts In Progress
Profile

✓ Your action was successful

Welcome User. You are logged in as the Purchase Card Approving/Billing Official.

## Task Inbox

User Name, you have 1 task(s).
To choose a task, please click on the Select button next to the desired task. You can also double click on the task row.

Displaying 1 - 1 of 1 # To Display 10

| | Task Status | Acquired | Request Type | Account Holder | Office Name | Account Number | Task Description | Comments |
|---|---|---|---|---|---|---|---|---|
| Select | New | 10/20/2011 | CA - New Account | | Office Name | | Please verify and approve the following Cardholder Account request. | |

sion: 2.4.007 USB: PROD

# A/BO Action 1

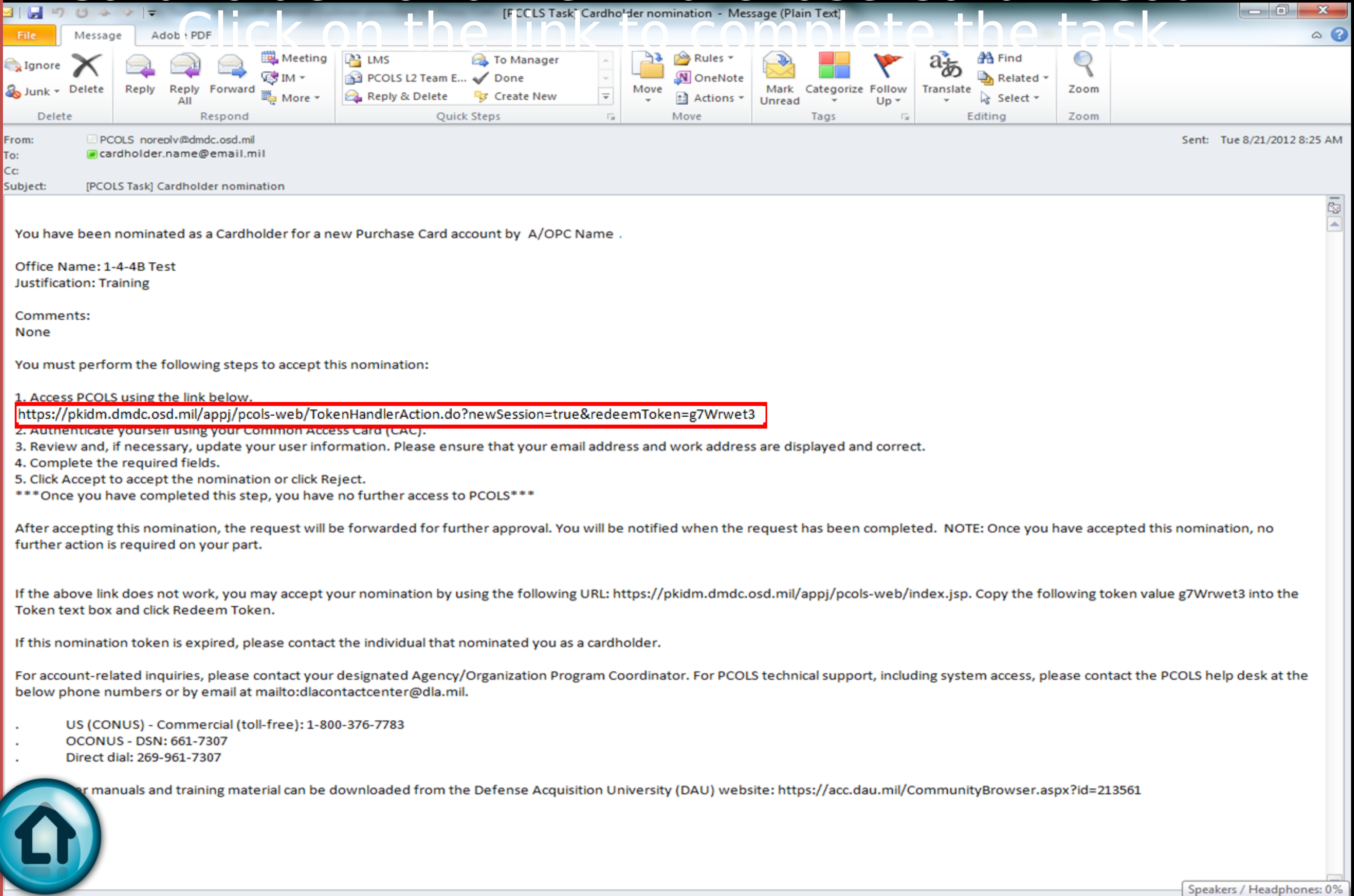
Complete

# Cardholder Action 1

## AIM: Complete Cardholder Nomination

# Cardholder Action 1 AIM: Complete Cardholder Nomination

# The Cardholder has received a PCOLS Task email stating “you have been nominated as a Cardholder for a New Purchase Card Account.” Click on the link to complete the task.


[PCOLS Task] Cardholder nomination - Message (Plain Text)
File
Message
Adobe PDF
Ignore
Junk
Delete
Delete
Reply
Reply All
Forward
Meeting
IM
More
Respond
LMS
PCOLS L2 Team E...
Reply & Delete
To Manager
Done
Create New
Quick Steps
Move
Rules
OneNote
Actions
Move
Mark Unread
Categorize
Follow Up
Tags
Translate
Find
Related
Select
Editing
Zoom
Zoom
Speakers / Headphones: 0%

From: PCOLS noreply@dmdc.osd.mil
To: cardholder.name@email.mil
Cc:
Subject: [PCOLS Task] Cardholder nomination

Sent: Tue 8/21/2012 8:25 AM

You have been nominated as a Cardholder for a new Purchase Card account by A/OPC Name .

Office Name: 1-4-4B Test
Justification: Training

Comments:
None

You must perform the following steps to accept this nomination:

1. Access PCOLS using the link below.
https://pkidm.dmdc.osd.mil/appj/pcols-web/TokenHandlerAction.do?newSession=true&redeemToken=g7Wrwet3
2. Authenticate yourself using your Common Access Card (CAC).
3. Review and, if necessary, update your user information. Please ensure that your email address and work address are displayed and correct.
4. Complete the required fields.
5. Click Accept to accept the nomination or click Reject.
***Once you have completed this step, you have no further access to PCOLS***

After accepting this nomination, the request will be forwarded for further approval. You will be notified when the request has been completed. NOTE: Once you have accepted this nomination, no further action is required on your part.

If the above link does not work, you may accept your nomination by using the following URL: https://pkidm.dmdc.osd.mil/appj/pcols-web/index.jsp. Copy the following token value g7Wrwet3 into the Token text box and click Redeem Token.

If this nomination token is expired, please contact the individual that nominated you as a cardholder.

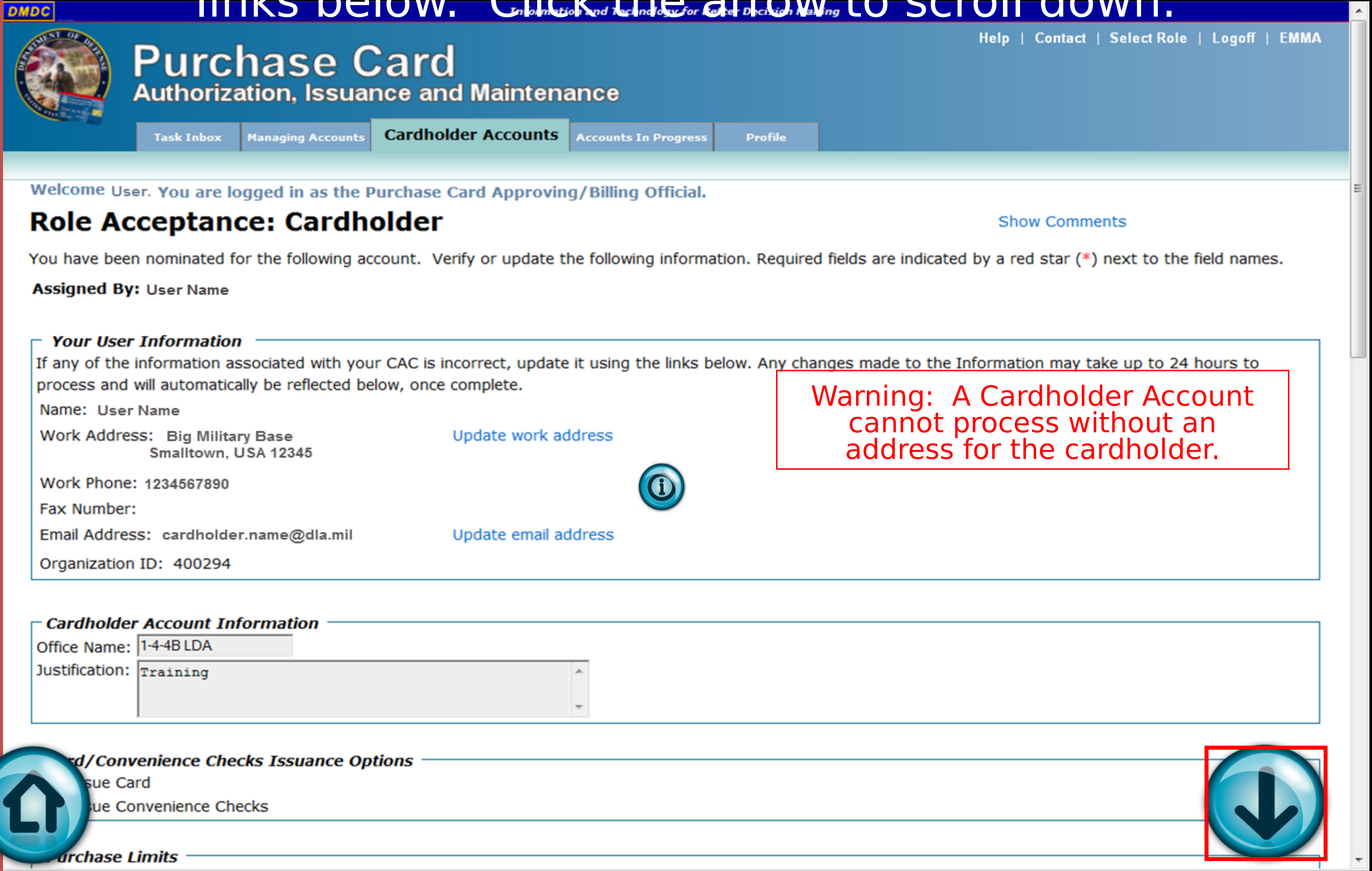
For account-related inquiries, please contact your designated Agency/Organization Program Coordinator. For PCOLS technical support, including system access, please contact the PCOLS help desk at the below phone numbers or by email at mailto:dlacontactcenter@dla.mil.

. US (CONUS) - Commercial (toll-free): 1-800-376-7783
. OCONUS - DSN: 661-7307
. Direct dial: 269-961-7307

...r manuals and training material can be downloaded from the Defense Acquisition University (DAU) website: https://acc.dau.mil/CommunityBrowser.aspx?id=213561

Cardholder Action 1 AIM: Complete Cardholder Nomination

The Cardholder verifies that their user information is correct. If any of the information associated with your CAC is missing or incorrect, updates can be made using the links below. Click the arrow to scroll down.


DMDC
Information and Technology for Better Decision Making
Help | Contact | Select Role | Logoff | EMMA
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Cardholder Accounts
Accounts In Progress
Profile

Welcome User. You are logged in as the Purchase Card Approving/Billing Official.

## Role Acceptance: Cardholder

Show Comments

You have been nominated for the following account. Verify or update the following information. Required fields are indicated by a red star (*) next to the field names.

**Assigned By:** User Name

***Your User Information***

If any of the information associated with your CAC is incorrect, update it using the links below. Any changes made to the Information may take up to 24 hours to process and will automatically be reflected below, once complete.

Name: User Name

Work Address: Big Military Base
Smalltown, USA 12345
Update work address

Work Phone: 1234567890

Fax Number:

Email Address: cardholder.name@dla.mil
Update email address

Organization ID: 400294

Warning: A Cardholder Account cannot process without an address for the cardholder.

***Cardholder Account Information***

Office Name: 1-4-4B LDA

Justification: Training

***rd/Convenience Checks Issuance Options***

sue Card

ue Convenience Checks

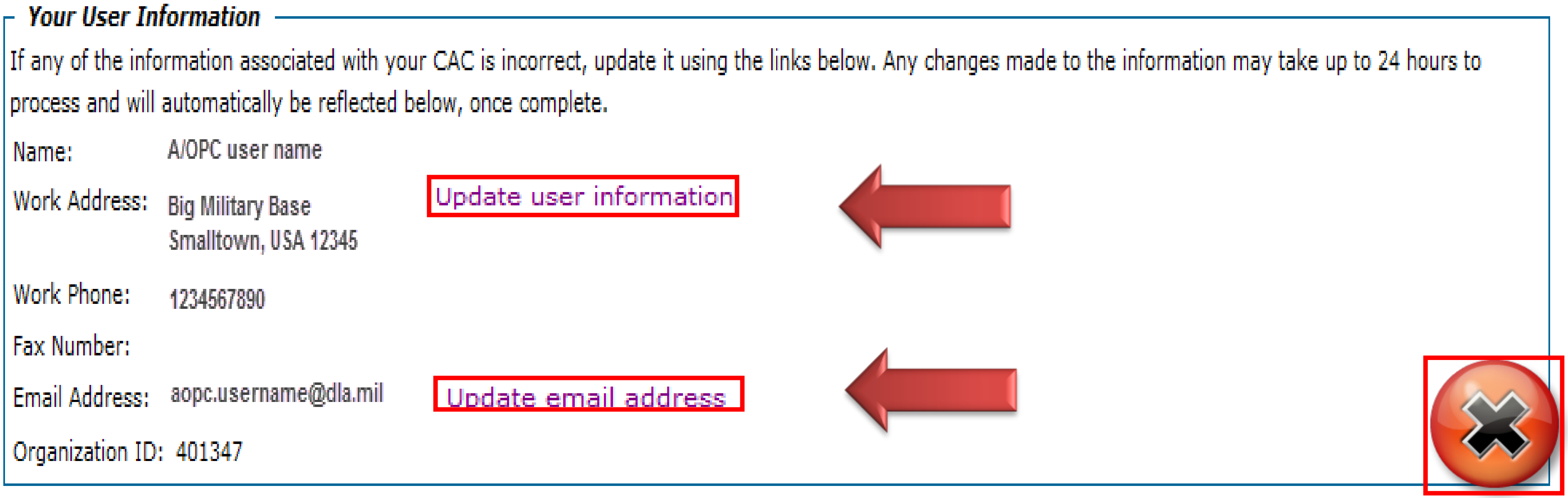
***urchase Limits***

# Verify your **User Information**.

If you need to add or update your work address information, click the "Update" link next to the corresponding field and you will be directed to milConnect to make the update.

If you need to add or update your email address, click the "Update" link net to the corresponding field and you will be directed to RAPIDS Self Service to update.

The **User Information** text box also displays your **Organization ID**. This ID is assigned according to your **Organization** in EMMA and cannot be changed.



***Your User Information***

If any of the information associated with your CAC is incorrect, update it using the links below. Any changes made to the information may take up to 24 hours to process and will automatically be reflected below, once complete.

Name: A/OPC user name

Work Address: Big Military Base
Smalltown, USA 12345

Work Phone: 1234567890

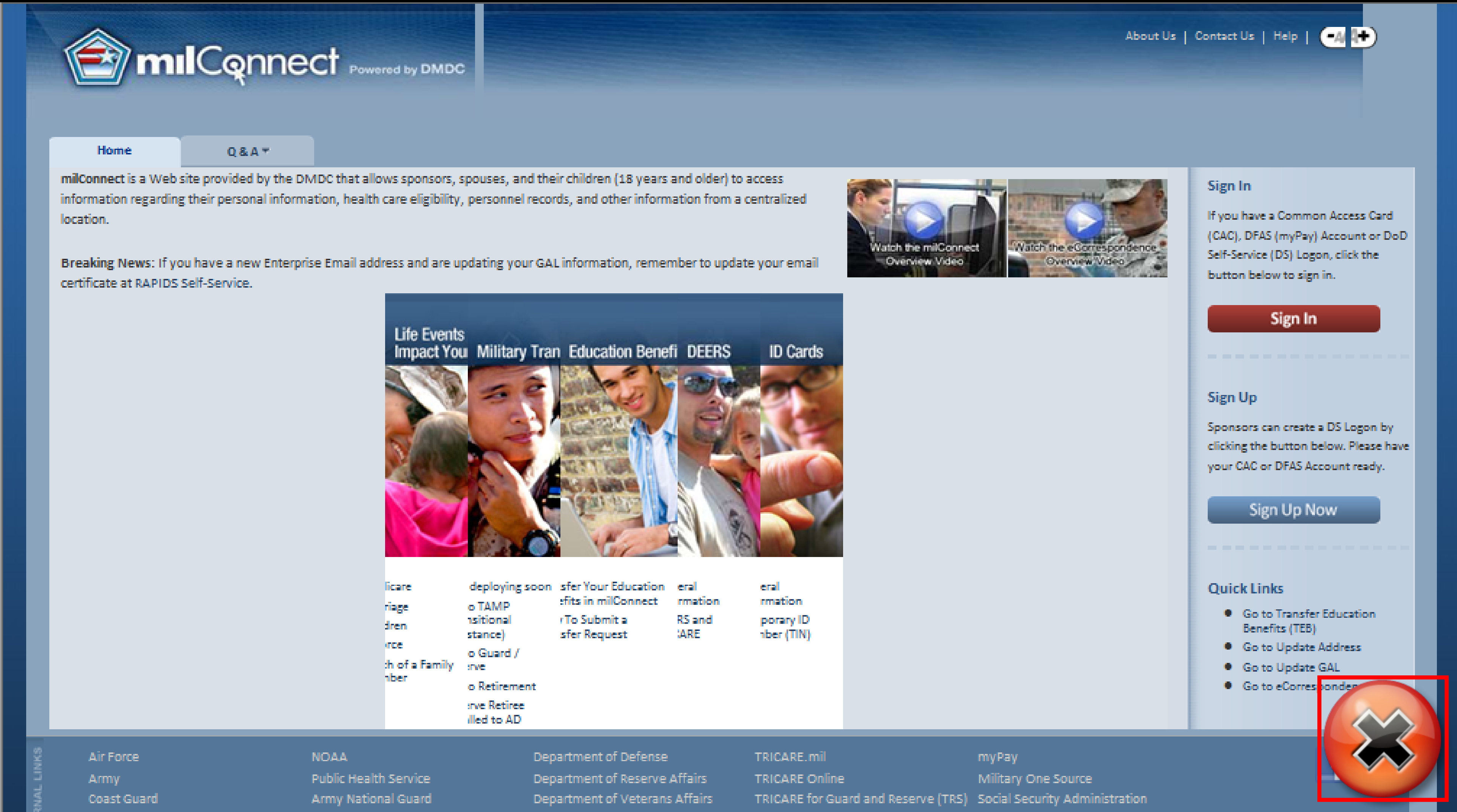
Fax Number:

Email Address: aopc.username@dla.mil

Organization ID: 401347

# milConnect

http://www.dmdc.osd.mil/milconnect


milConnect Powered by DMDC
About Us | Contact Us | Help |
Home
Q & A
Watch the milConnect Overview Video
Watch the eCorrespondence Overview Video
Life Events Impact You
Military Tran
Education Benefi
DEERS
ID Cards
licare
riage
dren
rce
h of a Family
nber
deploying soon
o TAMP
nsitional
stance)
o Guard /
rve
o Retirement
rve Retiree
lled to AD
sfer Your Education
efits in milConnect
To Submit a
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eral
rmation
RS and
ARE
eral
rmation
porary ID
nber (TIN)
Sign In
Sign Up
Sign Up Now
Quick Links
Air Force
Army
Coast Guard
NOAA
Public Health Service
Army National Guard
Department of Defense
Department of Reserve Affairs
Department of Veterans Affairs
TRICARE.mil
TRICARE Online
TRICARE for Guard and Reserve (TRS)
myPay
Military One Source
Social Security Administration

**milConnect** is a Web site provided by the DMDC that allows sponsors, spouses, and their children (18 years and older) to access information regarding their personal information, health care eligibility, personnel records, and other information from a centralized location.

**Breaking News:** If you have a new Enterprise Email address and are updating your GAL information, remember to update your email certificate at RAPIDS Self-Service.

**Sign In**

If you have a Common Access Card (CAC), DFAS (myPay) Account or DoD Self-Service (DS) Logon, click the button below to sign in.

Sign In

**Sign Up**

Sponsors can create a DS Logon by clicking the button below. Please have your CAC or DFAS Account ready.

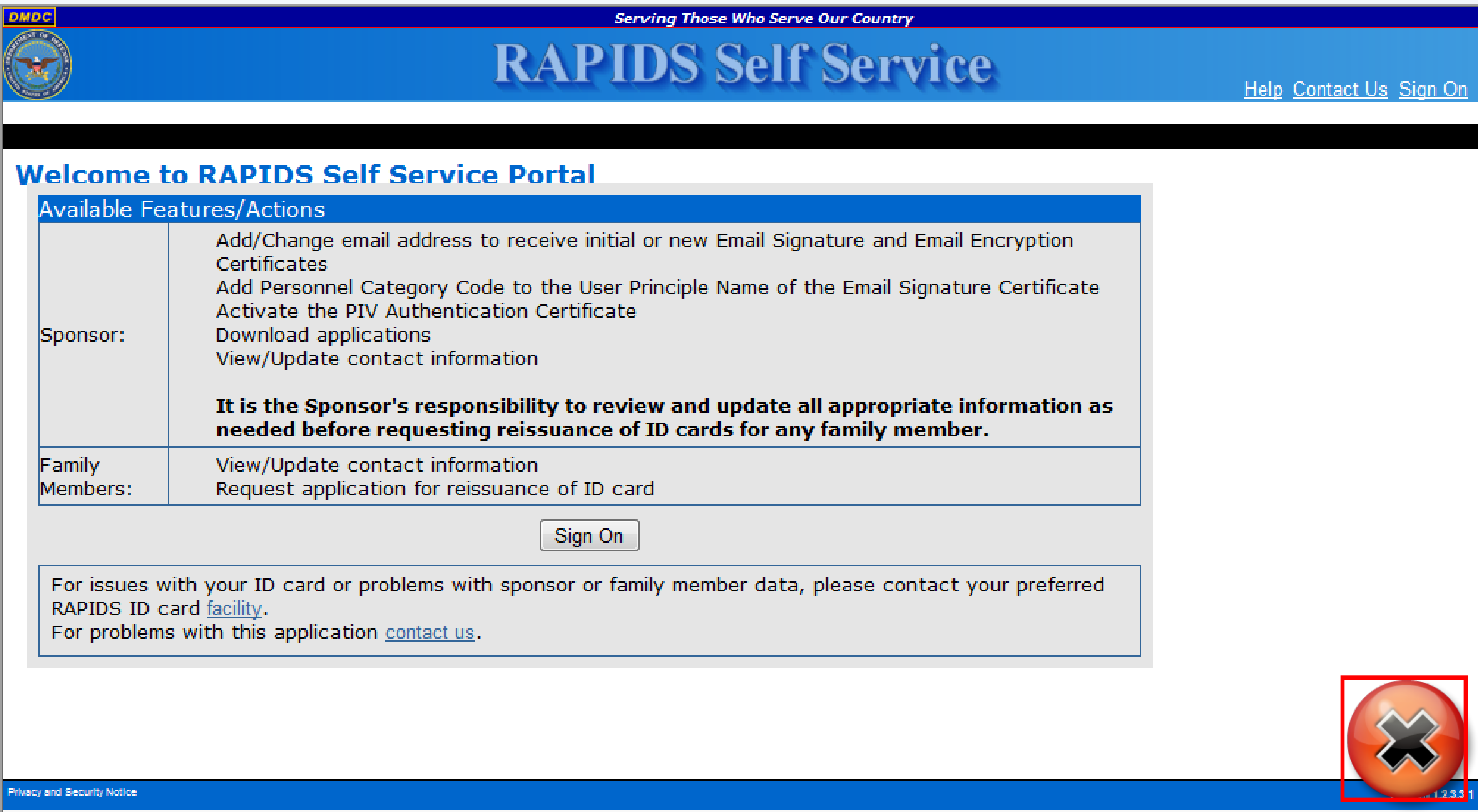
Sign Up Now

**Quick Links**

- Go to Transfer Education Benefits (TEB)
- Go to Update Address
- Go to Update GAL
- Go to eCorrespondence

# RAPIDS Self Service

http://www.dmdc.osd.mil/self_service/


DMDC
Serving Those Who Serve Our Country
RAPIDS Self Service
Help
Contact Us
Sign On

## Welcome to RAPIDS Self Service Portal

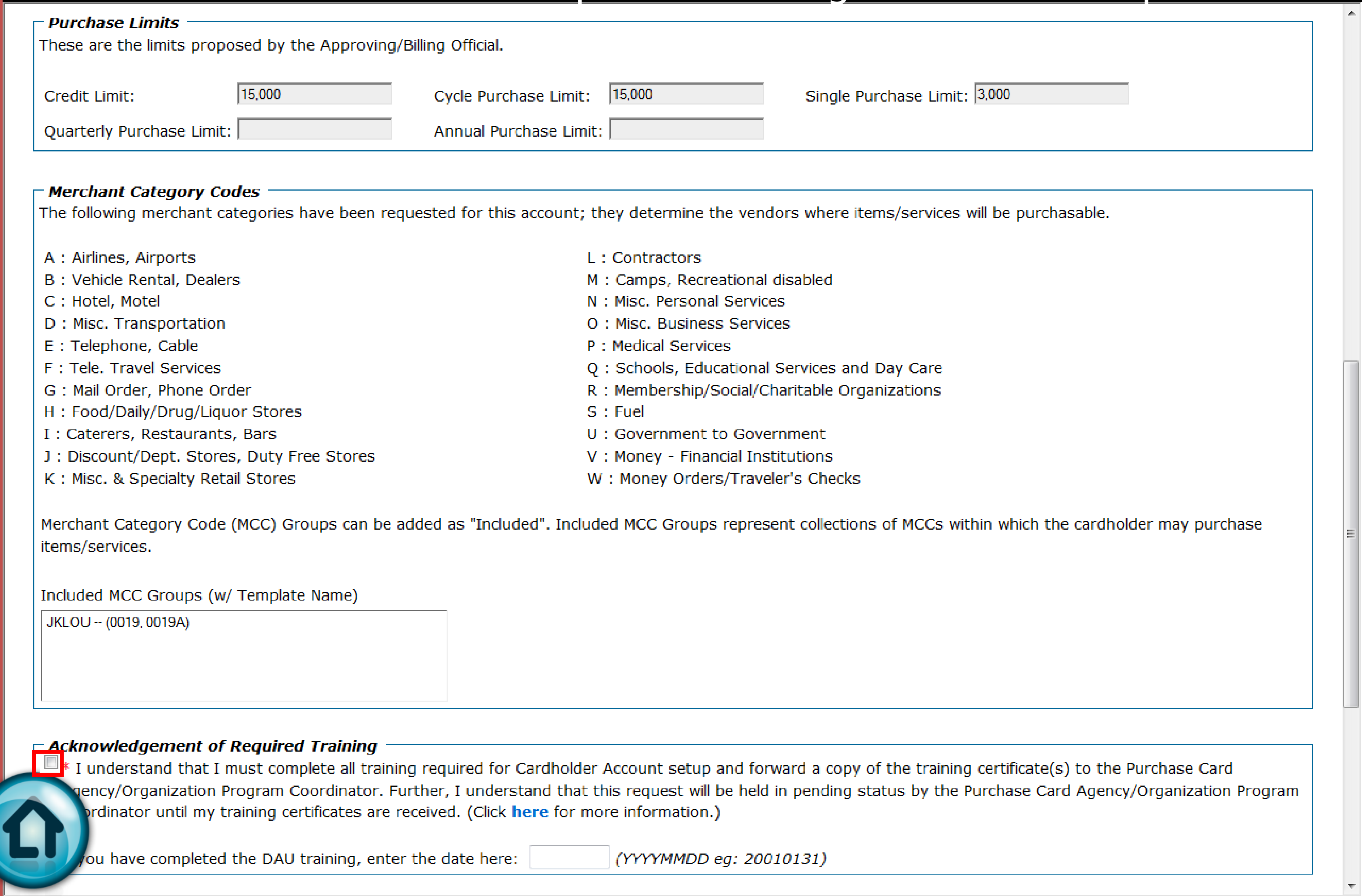
| Available Features/Actions | |
|---|---|
| Sponsor: | Add/Change email address to receive initial or new Email Signature and Email Encryption Certificates<br>Add Personnel Category Code to the User Principle Name of the Email Signature Certificate<br>Activate the PIV Authentication Certificate<br>Download applications<br>View/Update contact information<br>**It is the Sponsor's responsibility to review and update all appropriate information as needed before requesting reissuance of ID cards for any family member.** |
| Family Members: | View/Update contact information<br>Request application for reissuance of ID card |

For issues with your ID card or problems with sponsor or family member data, please contact your preferred RAPIDS ID card facility.
For problems with this application contact us.

Privacy and Security Notice

# Cardholder Action 1 AIM: Complete Cardholder Nomination

The Cardholder must complete the required training before the new account can be established. Cardholders should refer to their A/OPC for questions regarding training requirements. Check the box to confirm that all required training has been completed.



***Purchase Limits***

These are the limits proposed by the Approving/Billing Official.

| | | | | | |
|---|---|---|---|---|---|
| Credit Limit: | 15,000 | Cycle Purchase Limit: | 15,000 | Single Purchase Limit: | 3,000 |
| Quarterly Purchase Limit: | | Annual Purchase Limit: | | | |

***Merchant Category Codes***

The following merchant categories have been requested for this account; they determine the vendors where items/services will be purchasable.

A : Airlines, Airports
B : Vehicle Rental, Dealers
C : Hotel, Motel
D : Misc. Transportation
E : Telephone, Cable
F : Tele. Travel Services
G : Mail Order, Phone Order
H : Food/Daily/Drug/Liquor Stores
I : Caterers, Restaurants, Bars
J : Discount/Dept. Stores, Duty Free Stores
K : Misc. & Specialty Retail Stores
L : Contractors
M : Camps, Recreational disabled
N : Misc. Personal Services
O : Misc. Business Services
P : Medical Services
Q : Schools, Educational Services and Day Care
R : Membership/Social/Charitable Organizations
S : Fuel
U : Government to Government
V : Money - Financial Institutions
W : Money Orders/Traveler's Checks

Merchant Category Code (MCC) Groups can be added as "Included". Included MCC Groups represent collections of MCCs within which the cardholder may purchase items/services.

Included MCC Groups (w/ Template Name)

JKLOU -- (0019, 0019A)

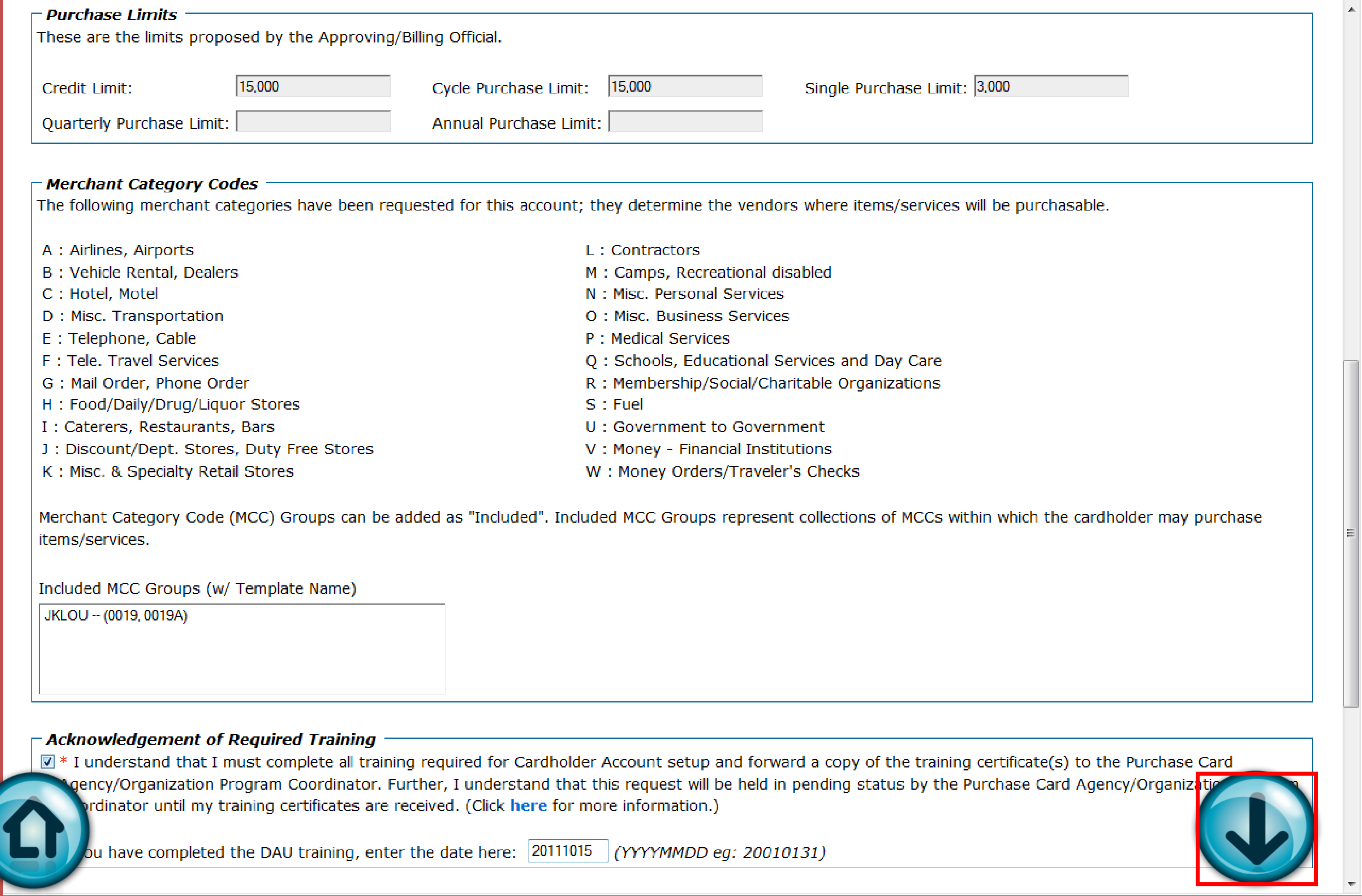
***Acknowledgement of Required Training***

☐ * I understand that I must complete all training required for Cardholder Account setup and forward a copy of the training certificate(s) to the Purchase Card gency/Organization Program Coordinator. Further, I understand that this request will be held in pending status by the Purchase Card Agency/Organization Program rdinator until my training certificates are received. (Click here for more information.)

you have completed the DAU training, enter the date here: ______ *(YYYYMMDD eg: 20010131)*

Cardholder Action 1 AIM: Complete Cardholder Nomination

# The Acknowledgement of Required Training has been checked and the Cardholder has entered the training completion date. If not completed, this field can be left blank. Click the arrow to scroll down.



***Purchase Limits***

These are the limits proposed by the Approving/Billing Official.

| | | | | | |
|---|---|---|---|---|---|
| Credit Limit: | 15,000 | Cycle Purchase Limit: | 15,000 | Single Purchase Limit: | 3,000 |
| Quarterly Purchase Limit: | | Annual Purchase Limit: | | | |

***Merchant Category Codes***

The following merchant categories have been requested for this account; they determine the vendors where items/services will be purchasable.

A : Airlines, Airports
B : Vehicle Rental, Dealers
C : Hotel, Motel
D : Misc. Transportation
E : Telephone, Cable
F : Tele. Travel Services
G : Mail Order, Phone Order
H : Food/Daily/Drug/Liquor Stores
I : Caterers, Restaurants, Bars
J : Discount/Dept. Stores, Duty Free Stores
K : Misc. & Specialty Retail Stores
L : Contractors
M : Camps, Recreational disabled
N : Misc. Personal Services
O : Misc. Business Services
P : Medical Services
Q : Schools, Educational Services and Day Care
R : Membership/Social/Charitable Organizations
S : Fuel
U : Government to Government
V : Money - Financial Institutions
W : Money Orders/Traveler's Checks

Merchant Category Code (MCC) Groups can be added as "Included". Included MCC Groups represent collections of MCCs within which the cardholder may purchase items/services.

Included MCC Groups (w/ Template Name)

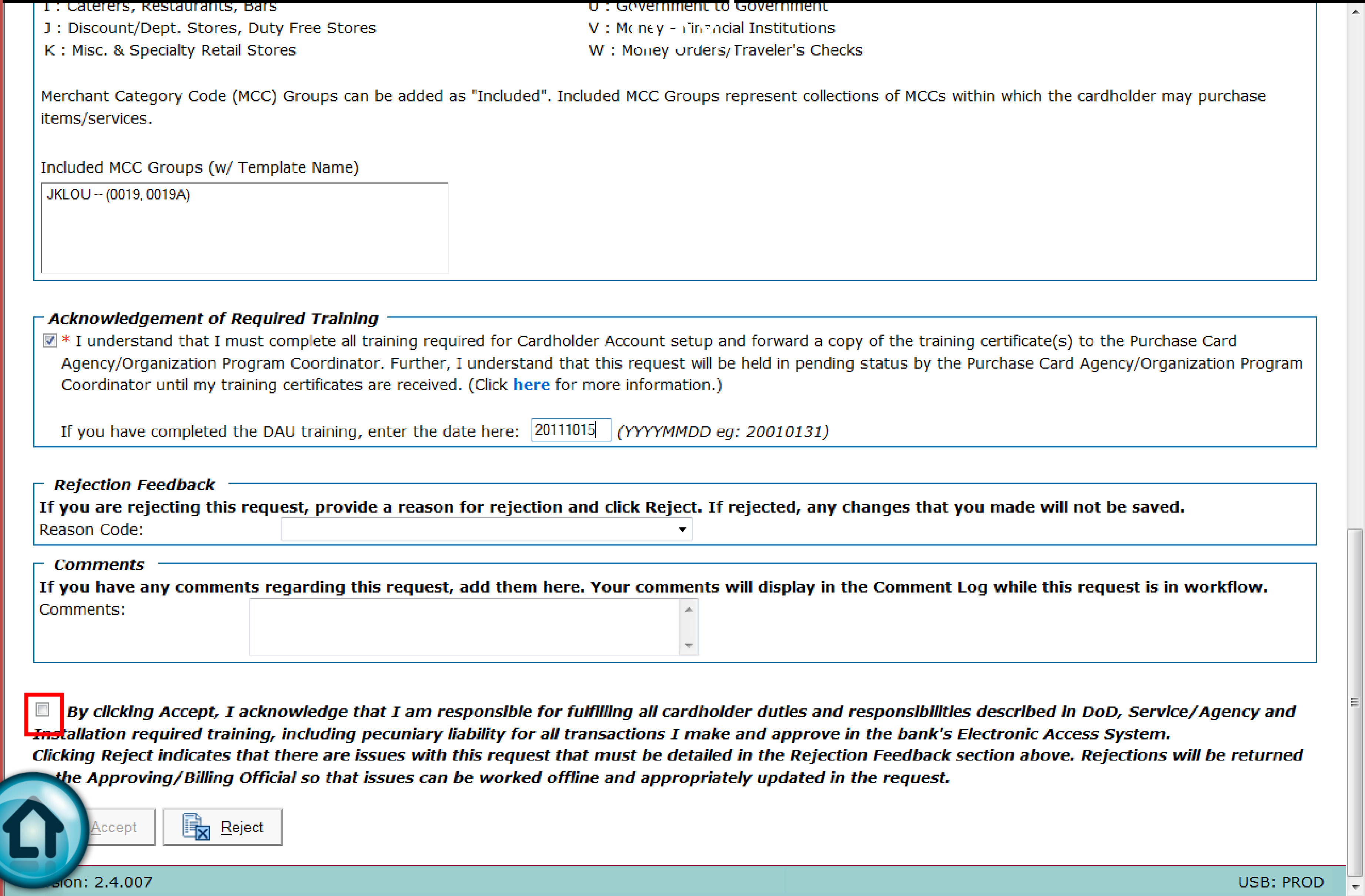
JKLOU -- (0019, 0019A)

***Acknowledgement of Required Training***

☑ * I understand that I must complete all training required for Cardholder Account setup and forward a copy of the training certificate(s) to the Purchase Card gency/Organization Program Coordinator. Further, I understand that this request will be held in pending status by the Purchase Card Agency/Organizatio rdinator until my training certificates are received. (Click **here** for more information.)

ou have completed the DAU training, enter the date here: 20111015 *(YYYYMMDD eg: 20010131)*

# By clicking Accept, the Cardholder is acknowledging responsibility for fulfilling all cardholder duties and responsibilities.  Click the



I : Caterers, Restaurants, Bars
U : Government to Government
J : Discount/Dept. Stores, Duty Free Stores
V : Money - Financial Institutions
K : Misc. & Specialty Retail Stores
W : Money Orders/Traveler's Checks

Merchant Category Code (MCC) Groups can be added as "Included". Included MCC Groups represent collections of MCCs within which the cardholder may purchase items/services.

Included MCC Groups (w/ Template Name)
JKLOU -- (0019, 0019A)

***Acknowledgement of Required Training***

☑ * I understand that I must complete all training required for Cardholder Account setup and forward a copy of the training certificate(s) to the Purchase Card Agency/Organization Program Coordinator. Further, I understand that this request will be held in pending status by the Purchase Card Agency/Organization Program Coordinator until my training certificates are received. (Click **here** for more information.)

If you have completed the DAU training, enter the date here: 20111015 *(YYYYMMDD eg: 20010131)*

***Rejection Feedback***

**If you are rejecting this request, provide a reason for rejection and click Reject. If rejected, any changes that you made will not be saved.**
Reason Code:

***Comments***

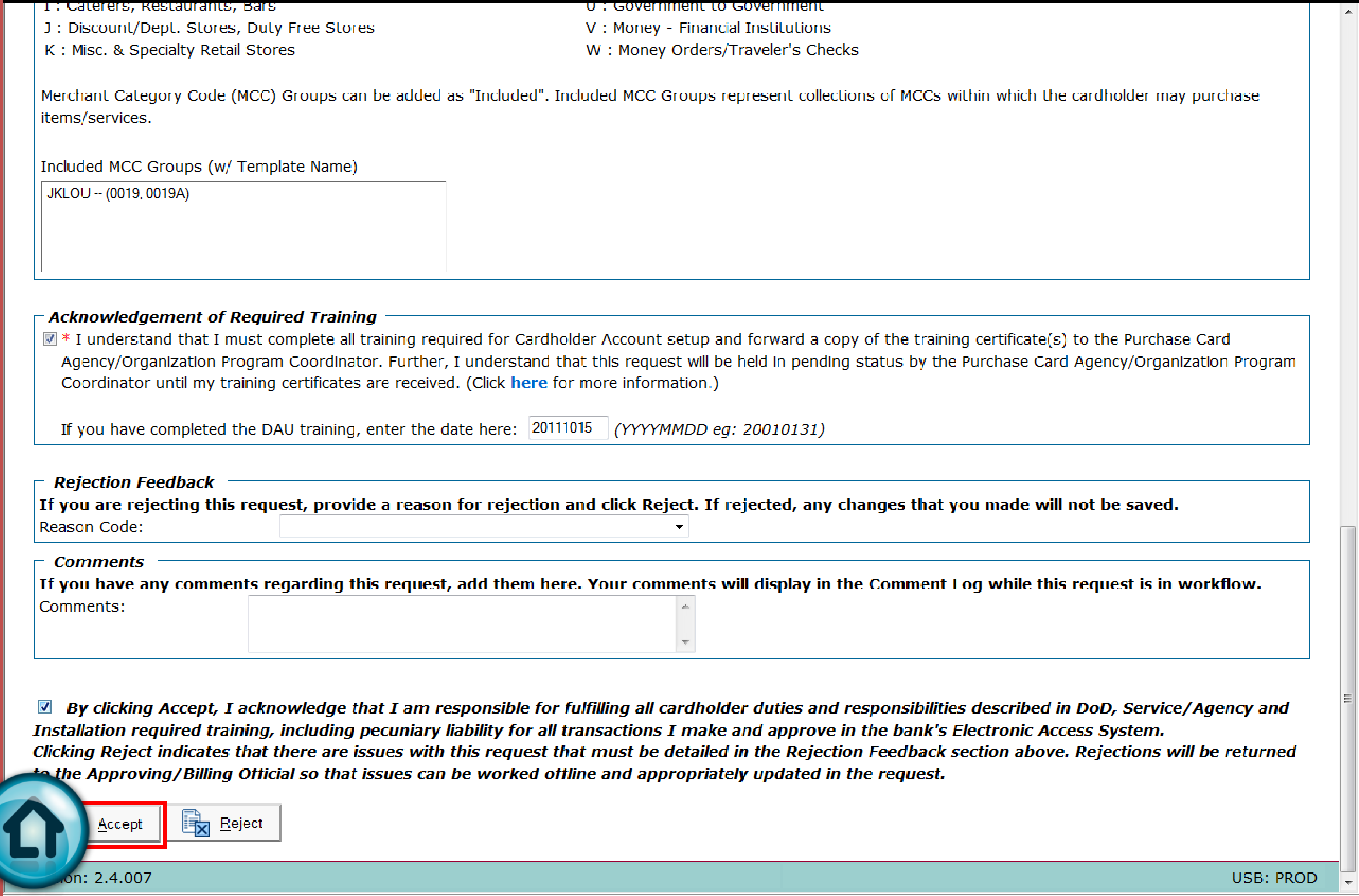
**If you have any comments regarding this request, add them here. Your comments will display in the Comment Log while this request is in workflow.**
Comments:

☐ ***By clicking Accept, I acknowledge that I am responsible for fulfilling all cardholder duties and responsibilities described in DoD, Service/Agency and Installation required training, including pecuniary liability for all transactions I make and approve in the bank's Electronic Access System.***
***Clicking Reject indicates that there are issues with this request that must be detailed in the Rejection Feedback section above. Rejections will be returned the Approving/Billing Official so that issues can be worked offline and appropriately updated in the request.***

sion: 2.4.007
USB: PROD

Cardholder Action 1 AIM: Complete Cardholder Nomination

# Click the “Accept” button.



| | |
|---|---|
| I : Caterers, Restaurants, Bars | U : Government to Government |
| J : Discount/Dept. Stores, Duty Free Stores | V : Money - Financial Institutions |
| K : Misc. & Specialty Retail Stores | W : Money Orders/Traveler's Checks |

Merchant Category Code (MCC) Groups can be added as "Included". Included MCC Groups represent collections of MCCs within which the cardholder may purchase items/services.

Included MCC Groups (w/ Template Name)

JKLOU -- (0019, 0019A)

***Acknowledgement of Required Training***

☑ * I understand that I must complete all training required for Cardholder Account setup and forward a copy of the training certificate(s) to the Purchase Card Agency/Organization Program Coordinator. Further, I understand that this request will be held in pending status by the Purchase Card Agency/Organization Program Coordinator until my training certificates are received. (Click **here** for more information.)

If you have completed the DAU training, enter the date here: 20111015 *(YYYYMMDD eg: 20010131)*

***Rejection Feedback***

**If you are rejecting this request, provide a reason for rejection and click Reject. If rejected, any changes that you made will not be saved.**

Reason Code:

***Comments***

**If you have any comments regarding this request, add them here. Your comments will display in the Comment Log while this request is in workflow.**

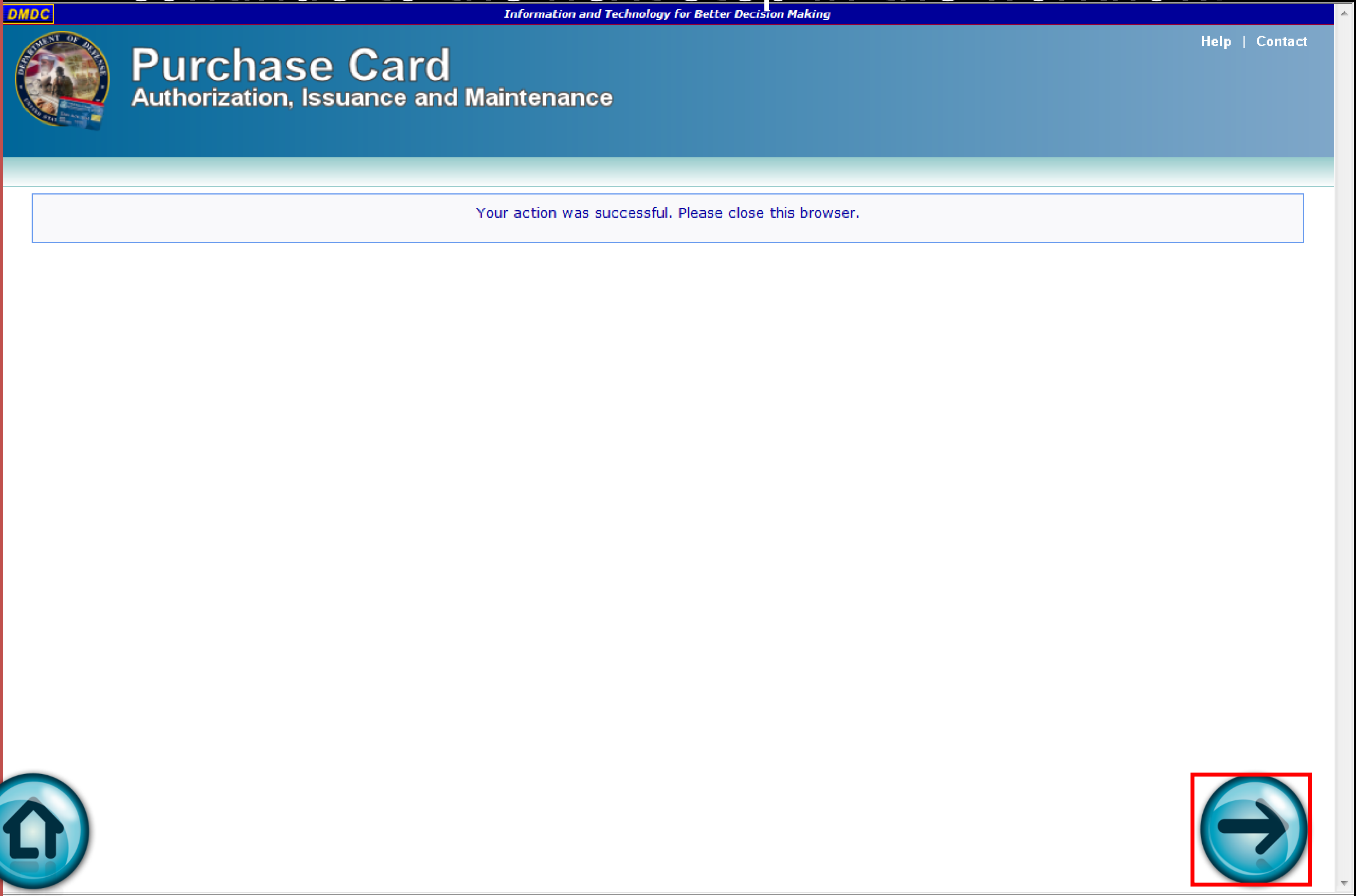
Comments:

☑ ***By clicking Accept, I acknowledge that I am responsible for fulfilling all cardholder duties and responsibilities described in DoD, Service/Agency and Installation required training, including pecuniary liability for all transactions I make and approve in the bank's Electronic Access System.***
***Clicking Reject indicates that there are issues with this request that must be detailed in the Rejection Feedback section above. Rejections will be returned to the Approving/Billing Official so that issues can be worked offline and appropriately updated in the request.***

…ion: 2.4.007 USB: PROD

Cardholder Action 1 AIM: Complete Cardholder Nomination

The action was successful. There in no further responsible as a cardholder. Click the arrow to continue to the next step in the workflow.


DMDC
Information and Technology for Better Decision Making
Purchase Card
Authorization, Issuance and Maintenance
Help | Contact

Your action was successful. Please close this browser.

# Cardholder Action 1

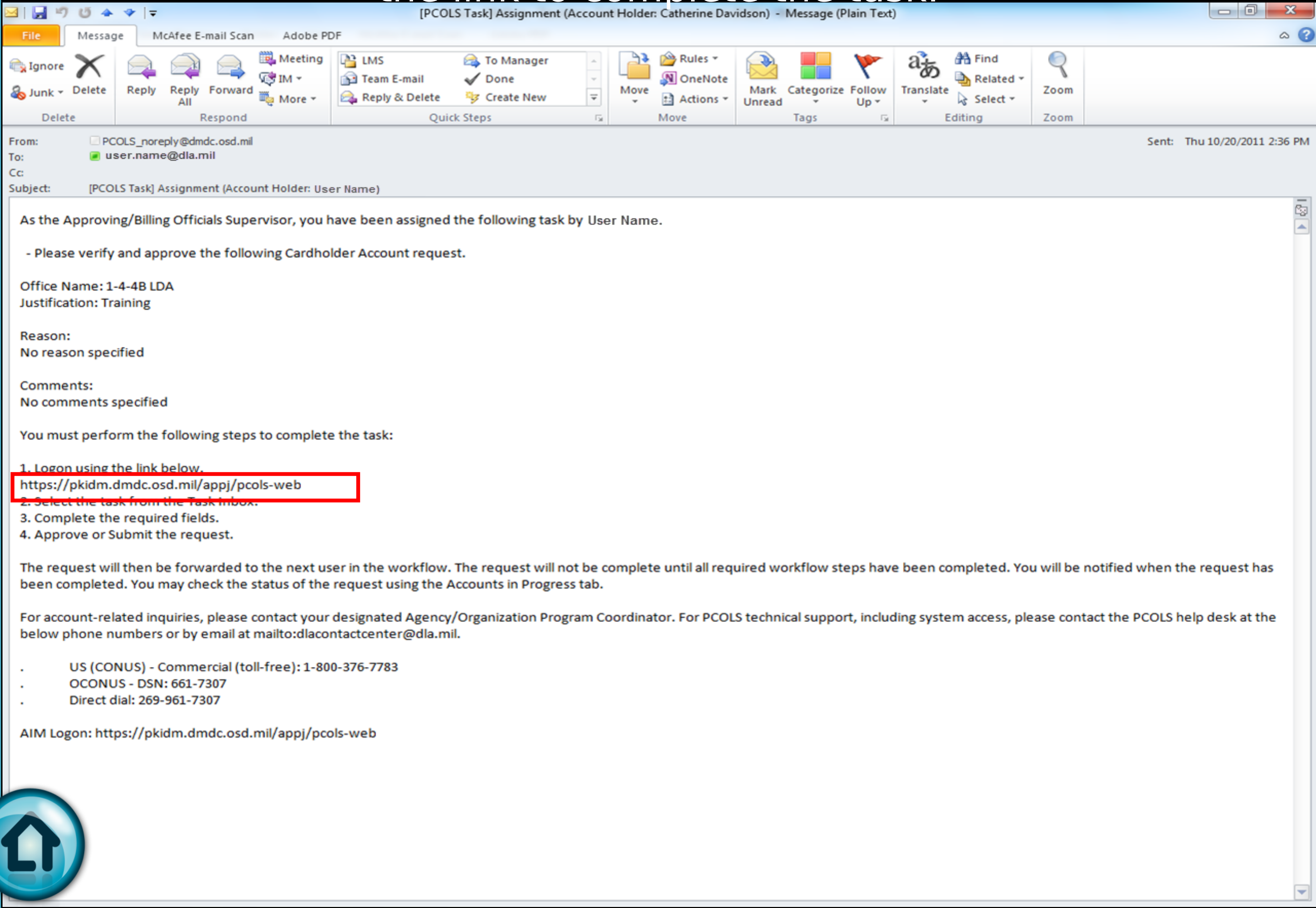
## Complete

# A/BO Supervisor Action 1

## AIM: Verify and Approve the New Cardholder Account Request

# A/BO Supervisor Action 1 AIM: Verify and Approve the New CA

The A/BO Supervisor has received a PCOLS Task email to “verify and approve the following Cardholder Account request.” Click on the link to complete the task.


[PCOLS Task] Assignment (Account Holder: Catherine Davidson) - Message (Plain Text)
File
Message
McAfee E-mail Scan
Adobe PDF
Ignore
Junk
Delete
Delete
Reply
Reply All
Forward
Meeting
IM
More
Respond
LMS
Team E-mail
Reply & Delete
To Manager
Done
Create New
Quick Steps
Move
Rules
OneNote
Actions
Move
Mark Unread
Categorize
Follow Up
Tags
Translate
Find
Related
Select
Editing
Zoom
Zoom

From: PCOLS_noreply@dmdc.osd.mil
To: user.name@dla.mil
Cc:
Subject: [PCOLS Task] Assignment (Account Holder: User Name)

Sent: Thu 10/20/2011 2:36 PM

As the Approving/Billing Officials Supervisor, you have been assigned the following task by User Name.

- Please verify and approve the following Cardholder Account request.

Office Name: 1-4-4B LDA
Justification: Training

Reason:
No reason specified

Comments:
No comments specified

You must perform the following steps to complete the task:

1. Logon using the link below.
https://pkidm.dmdc.osd.mil/appj/pcols-web
2. Select the task from the Task Inbox.
3. Complete the required fields.
4. Approve or Submit the request.

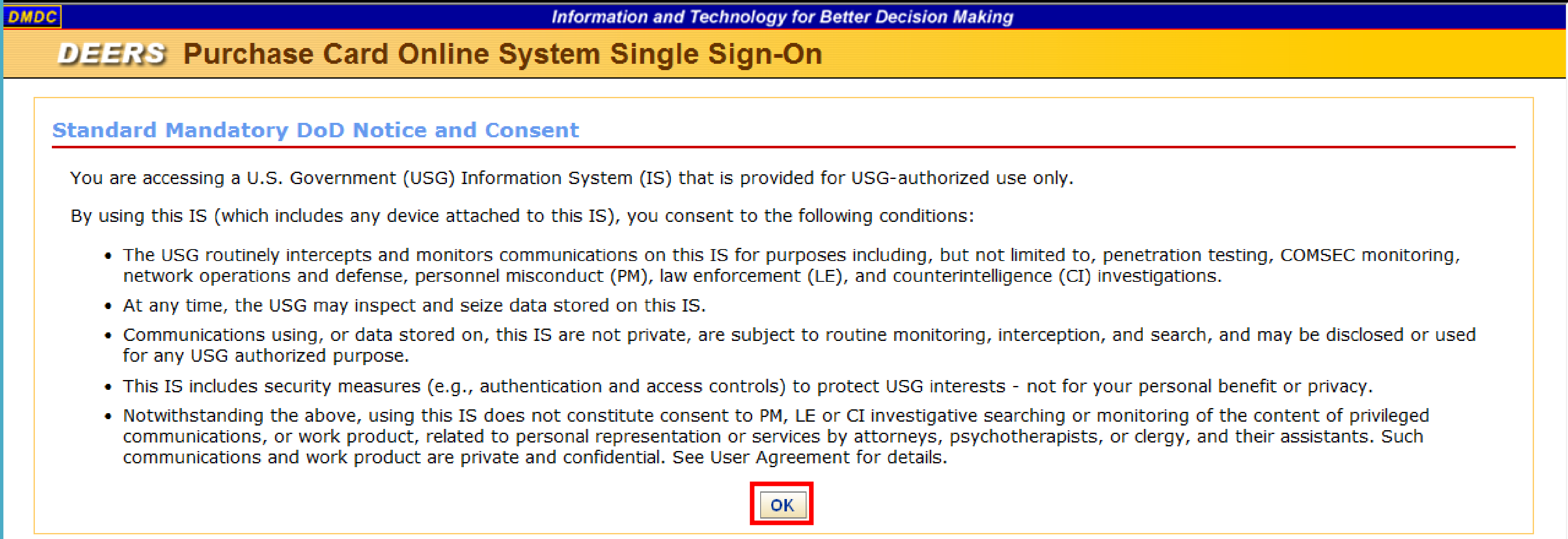
The request will then be forwarded to the next user in the workflow. The request will not be complete until all required workflow steps have been completed. You will be notified when the request has been completed. You may check the status of the request using the Accounts in Progress tab.

For account-related inquiries, please contact your designated Agency/Organization Program Coordinator. For PCOLS technical support, including system access, please contact the PCOLS help desk at the below phone numbers or by email at mailto:dlacontactcenter@dla.mil.

- US (CONUS) - Commercial (toll-free): 1-800-376-7783
- OCONUS - DSN: 661-7307
- Direct dial: 269-961-7307

AIM Logon: https://pkidm.dmdc.osd.mil/appj/pcols-web

# Click the “OK” button.


DMDC
Information and Technology for Better Decision Making
DEERS Purchase Card Online System Single Sign-On

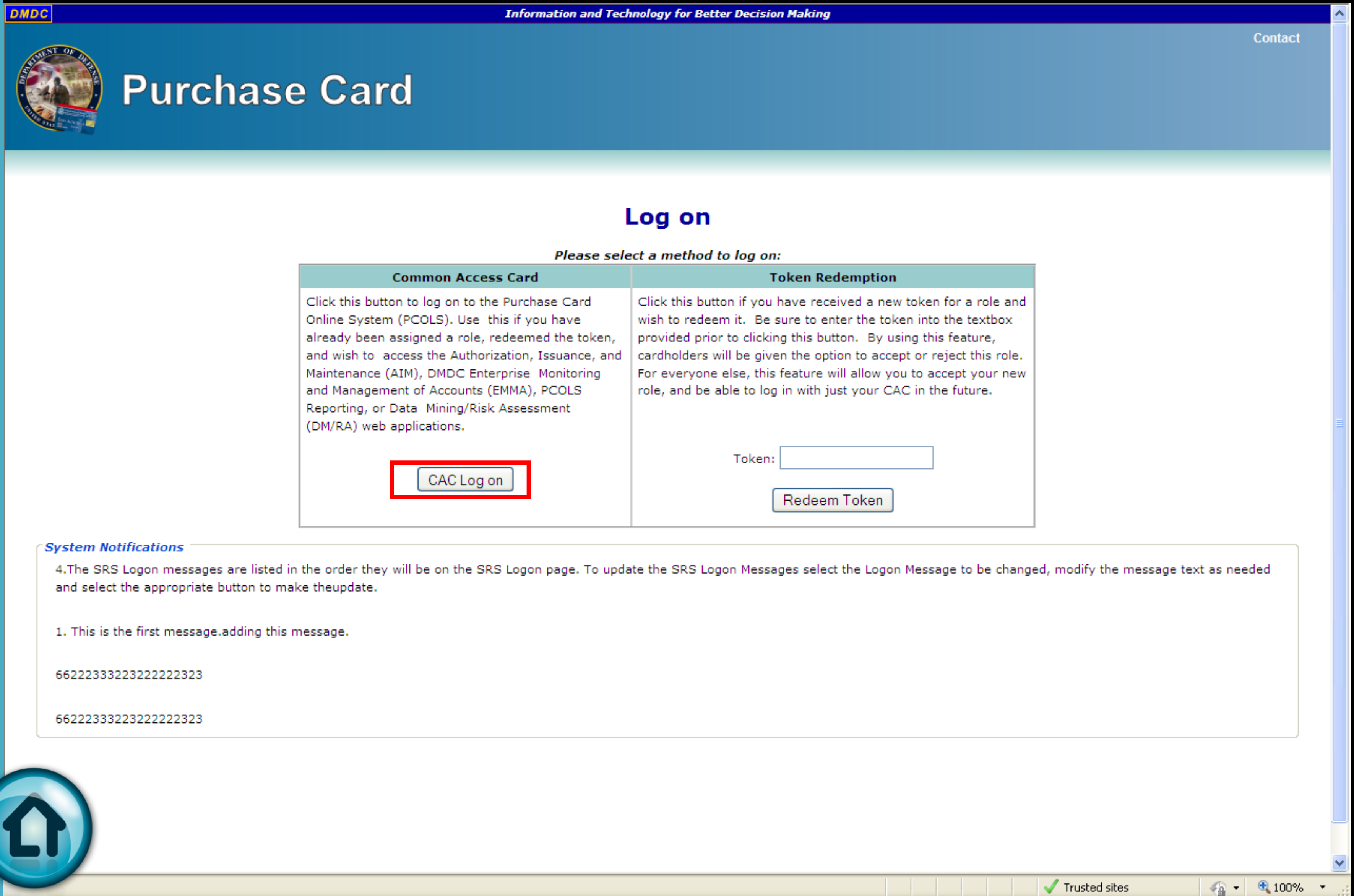
**Standard Mandatory DoD Notice and Consent**

You are accessing a U.S. Government (USG) Information System (IS) that is provided for USG-authorized use only.

By using this IS (which includes any device attached to this IS), you consent to the following conditions:

- The USG routinely intercepts and monitors communications on this IS for purposes including, but not limited to, penetration testing, COMSEC monitoring, network operations and defense, personnel misconduct (PM), law enforcement (LE), and counterintelligence (CI) investigations.
- At any time, the USG may inspect and seize data stored on this IS.
- Communications using, or data stored on, this IS are not private, are subject to routine monitoring, interception, and search, and may be disclosed or used for any USG authorized purpose.
- This IS includes security measures (e.g., authentication and access controls) to protect USG interests - not for your personal benefit or privacy.
- Notwithstanding the above, using this IS does not constitute consent to PM, LE or CI investigative searching or monitoring of the content of privileged communications, or work product, related to personal representation or services by attorneys, psychotherapists, or clergy, and their assistants. Such communications and work product are private and confidential. See User Agreement for details.

# Click the “CAC Log on” button



## Log on

*Please select a method to log on:*

| Common Access Card | Token Redemption |
|---|---|
| Click this button to log on to the Purchase Card Online System (PCOLS). Use this if you have already been assigned a role, redeemed the token, and wish to access the Authorization, Issuance, and Maintenance (AIM), DMDC Enterprise Monitoring and Management of Accounts (EMMA), PCOLS Reporting, or Data Mining/Risk Assessment (DM/RA) web applications. | Click this button if you have received a new token for a role and wish to redeem it. Be sure to enter the token into the textbox provided prior to clicking this button. By using this feature, cardholders will be given the option to accept or reject this role. For everyone else, this feature will allow you to accept your new role, and be able to log in with just your CAC in the future. |
| CAC Log on | Token: ______<br>Redeem Token |

*System Notifications*

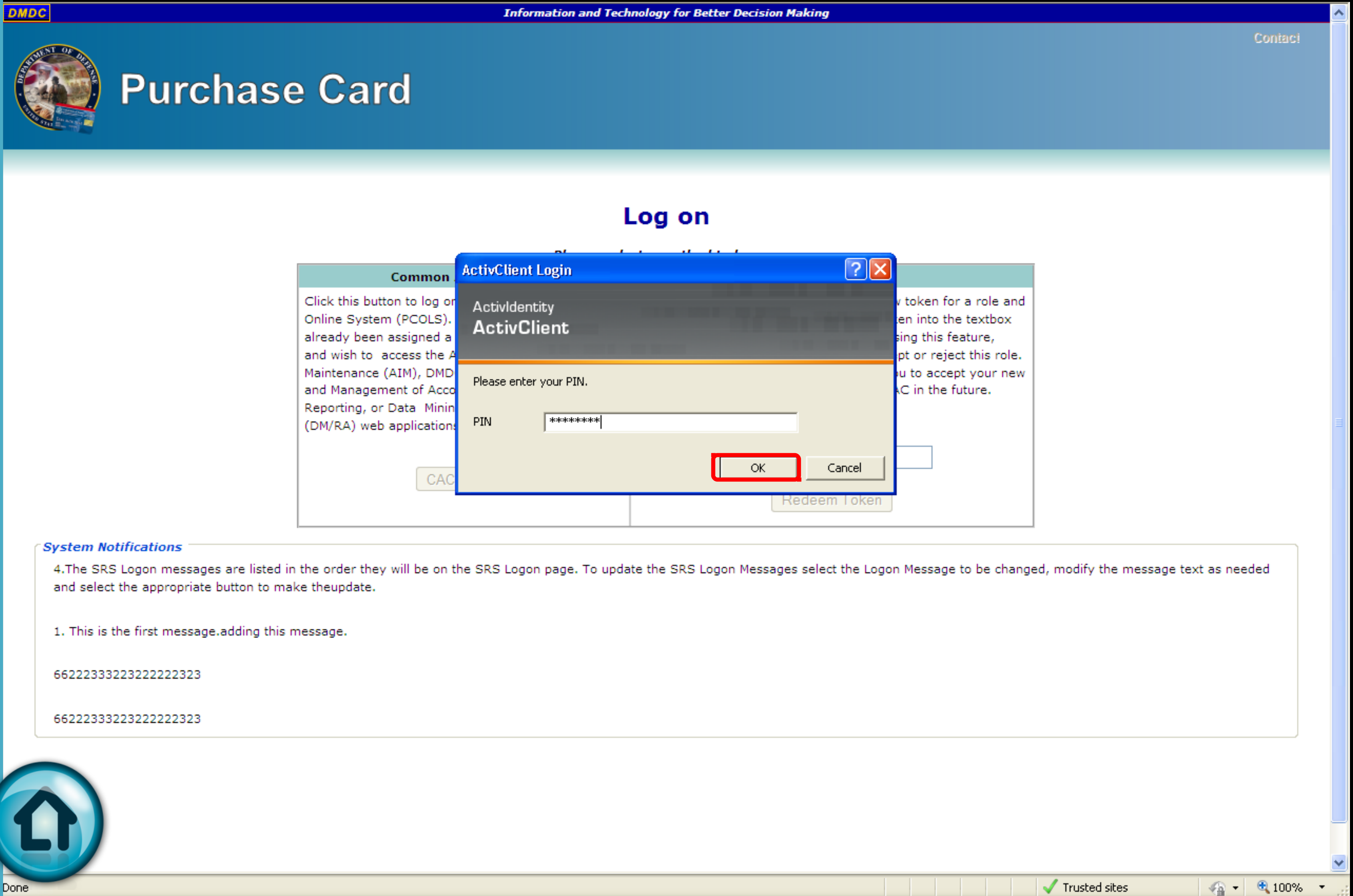
4.The SRS Logon messages are listed in the order they will be on the SRS Logon page. To update the SRS Logon Messages select the Logon Message to be changed, modify the message text as needed and select the appropriate button to make theupdate.

1. This is the first message.adding this message.

66222333223222222323

66222333223222222323

# The A/BO Supervisor enters their PIN. Click the “OK” button.



DMDC
Information and Technology for Better Decision Making
Contact
Purchase Card

## Log on

Common

Click this button to log or
Online System (PCOLS).
already been assigned a
and wish to access the A
Maintenance (AIM), DMD
and Management of Acco
Reporting, or Data Minin
(DM/RA) web application

token for a role and
en into the textbox
ing this feature,
pt or reject this role.
u to accept your new
C in the future.

CAC
Redeem Token
ActivClient Login
ActivIdentity
ActivClient

Please enter your PIN.

PIN ********

OK
Cancel

***System Notifications***

4.The SRS Logon messages are listed in the order they will be on the SRS Logon page. To update the SRS Logon Messages select the Logon Message to be changed, modify the message text as needed and select the appropriate button to make theupdate.

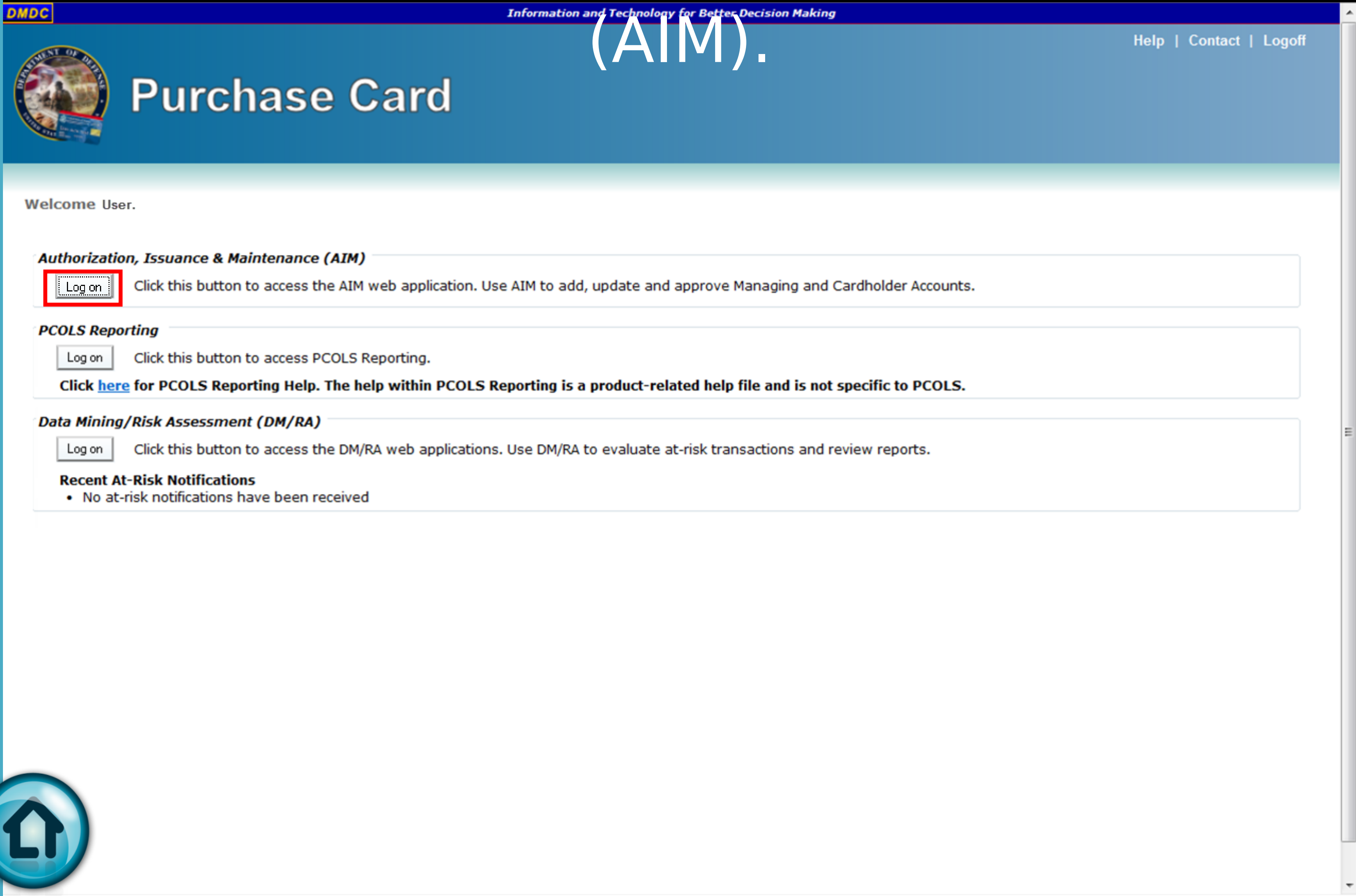
1. This is the first message.adding this message.

66222333223222222323

66222333223222222323

Done
Trusted sites
100%

# Click on the “Log on” button for Authorization, Issuance & Maintenance (AIM).


DMDC
Information and Technology for Better Decision Making
Help | Contact | Logoff
Purchase Card
Log on
Log on
Log on

Welcome User.

***Authorization, Issuance & Maintenance (AIM)***

Click this button to access the AIM web application. Use AIM to add, update and approve Managing and Cardholder Accounts.

***PCOLS Reporting***

Click this button to access PCOLS Reporting.

**Click here for PCOLS Reporting Help. The help within PCOLS Reporting is a product-related help file and is not specific to PCOLS.**

***Data Mining/Risk Assessment (DM/RA)***

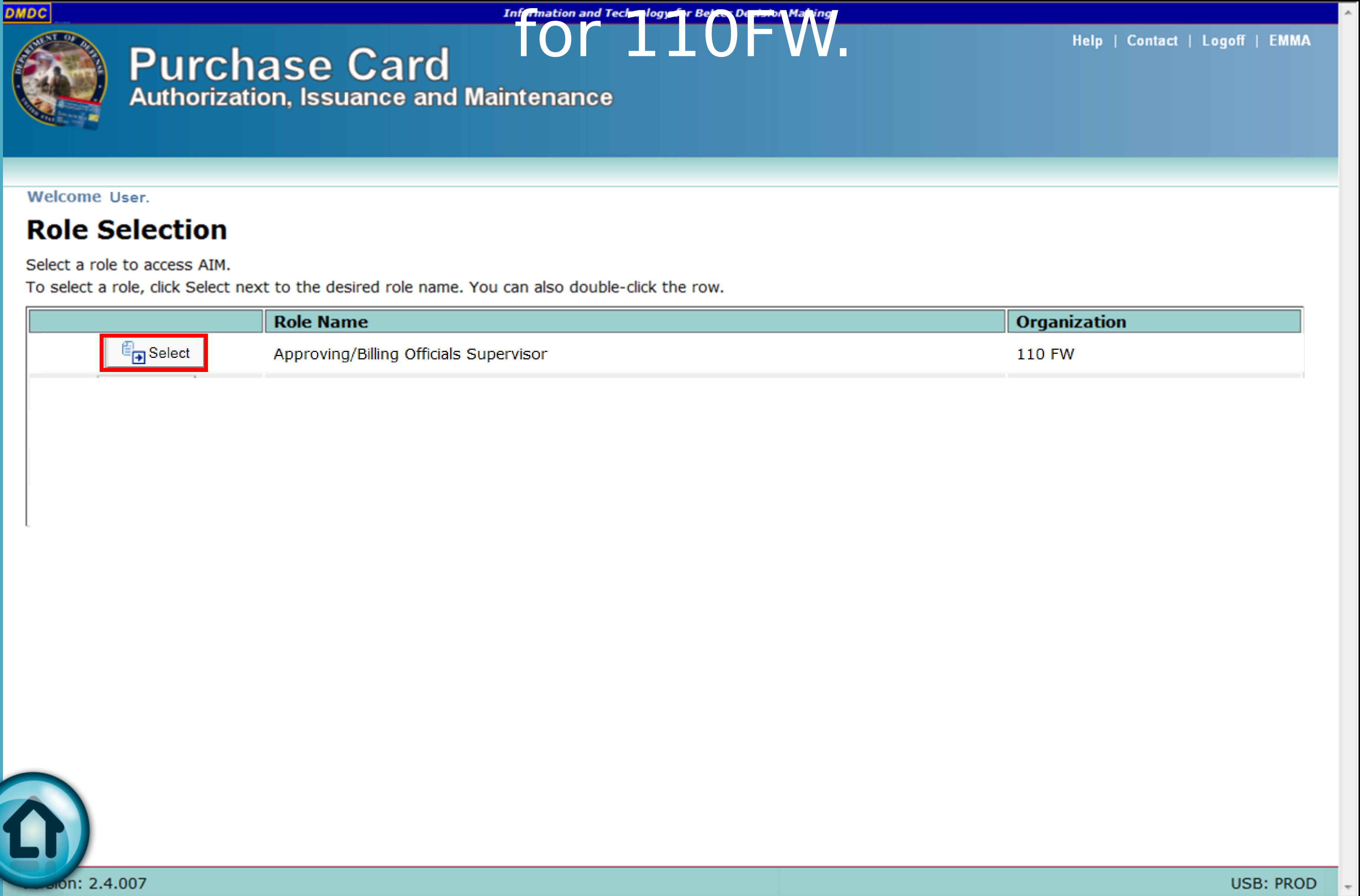
Click this button to access the DM/RA web applications. Use DM/RA to evaluate at-risk transactions and review reports.

**Recent At-Risk Notifications**

- No at-risk notifications have been received

A/BO Supervisor Action 1 AIM: Verify and Approve the New CA

# Click the “Select” button for the Approving/Billing Officials Supervisor role for 110FW.


DMDC
Information and Technology for Better Decision Making
Purchase Card
Authorization, Issuance and Maintenance
Help | Contact | Logoff | EMMA

Welcome User.

## Role Selection

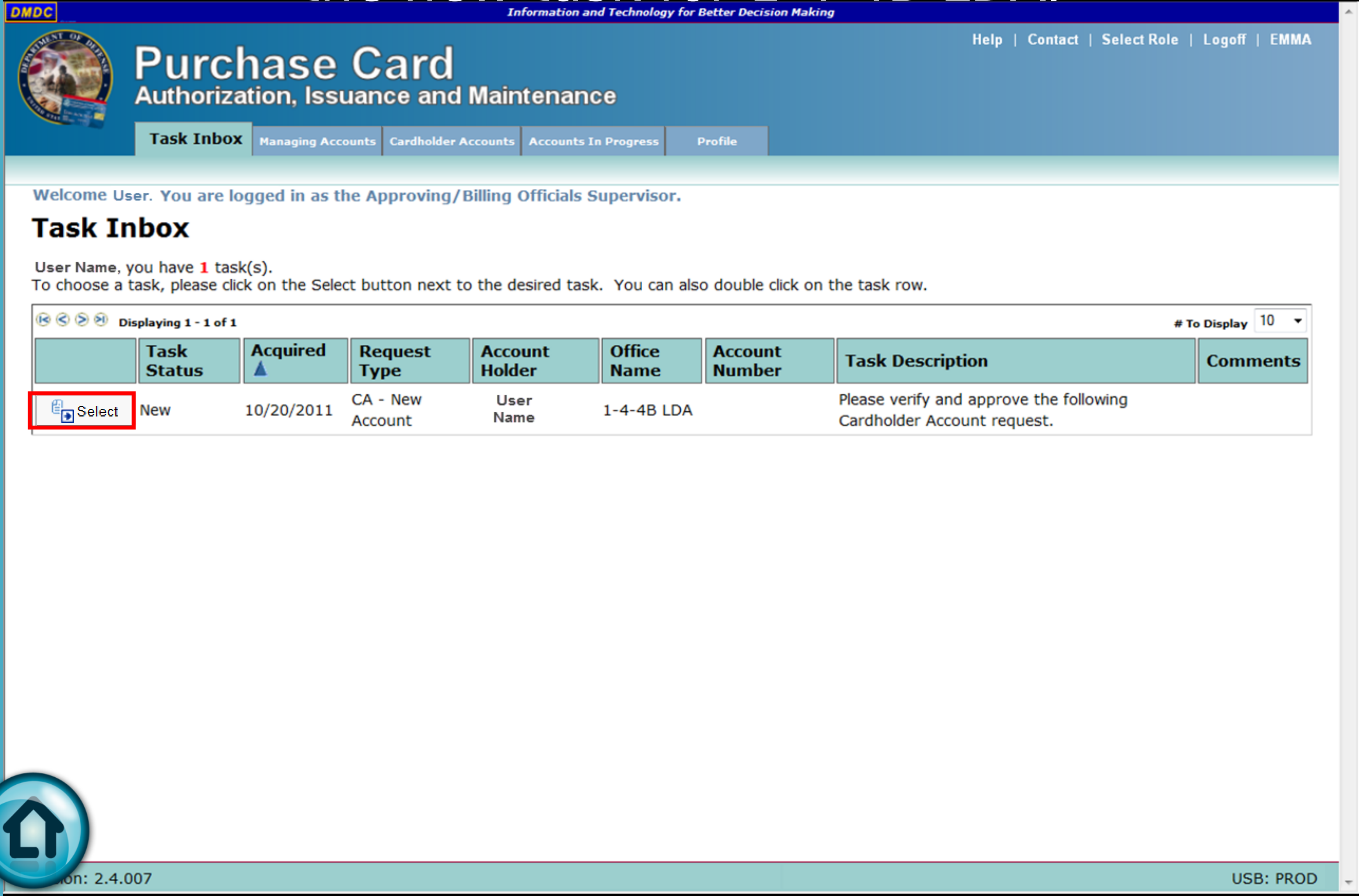
Select a role to access AIM.
To select a role, click Select next to the desired role name. You can also double-click the row.

| | Role Name | Organization |
|---|---|---|
| Select | Approving/Billing Officials Supervisor | 110 FW |

Version: 2.4.007
USB: PROD

A/BO Supervisor Action 1 AIM: Verify and Approve the New CA

# The A/BO Supervisor has been directed to their Task Inbox. Click on the “Select” button to view the new task for 1-4-4B LDA.


DMDC
Information and Technology for Better Decision Making
Help | Contact | Select Role | Logoff | EMMA
Purchase Card
Authorization, Issuance and Maintenance
Task Inbox
Managing Accounts
Cardholder Accounts
Accounts In Progress
Profile

Welcome User. You are logged in as the Approving/Billing Officials Supervisor.

Task Inbox

User Name, you have 1 task(s).
To choose a task, please click on the Select button next to the desired task. You can also double click on the task row.

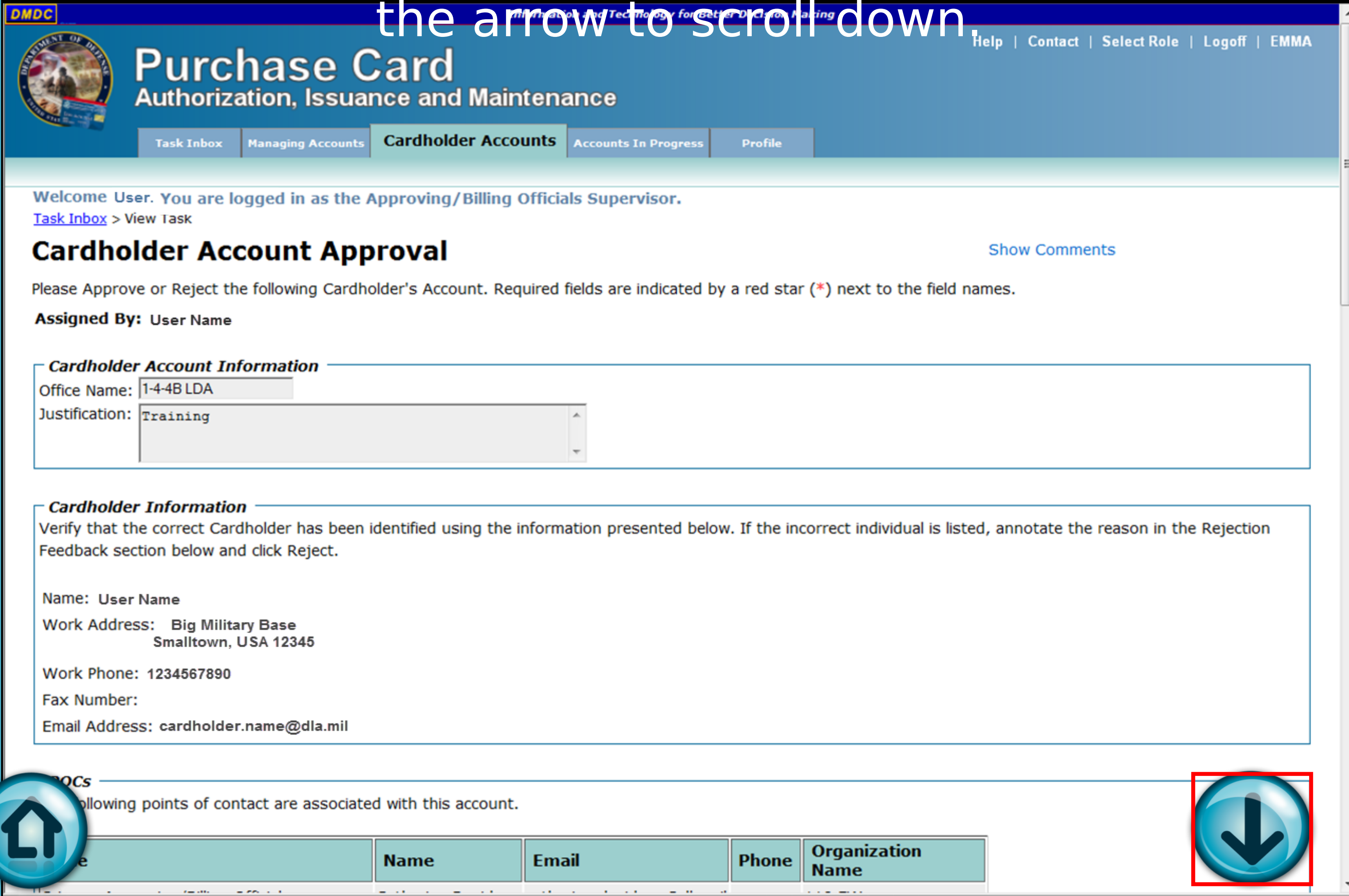
Displaying 1 - 1 of 1 — # To Display 10

| | Task Status | Acquired | Request Type | Account Holder | Office Name | Account Number | Task Description | Comments |
|---|---|---|---|---|---|---|---|---|
| Select | New | 10/20/2011 | CA - New Account | User Name | 1-4-4B LDA | | Please verify and approve the following Cardholder Account request. | |

ion: 2.4.007 USB: PROD

# A/BO Supervisor Action 1 AIM: Verify and Approve the New CA

The A/BO Supervisor verifies that the Cardholder Account information is correct. Nothing additional is required to be input in this step in the workflow. Click the arrow to scroll down.


DMDC
Information and Technology for Better Decision Making
Help | Contact | Select Role | Logoff | EMMA
Purchase Card
Authorization, Issuance and Maintenance
Task Inbox
Managing Accounts
Cardholder Accounts
Accounts In Progress
Profile

Welcome User. You are logged in as the Approving/Billing Officials Supervisor.

Task Inbox > View Task

## Cardholder Account Approval

Show Comments

Please Approve or Reject the following Cardholder's Account. Required fields are indicated by a red star (*) next to the field names.

**Assigned By:** User Name

*Cardholder Account Information*

Office Name: 1-4-4B LDA

Justification: Training

*Cardholder Information*

Verify that the correct Cardholder has been identified using the information presented below. If the incorrect individual is listed, annotate the reason in the Rejection Feedback section below and click Reject.

Name: User Name

Work Address: Big Military Base
Smalltown, USA 12345

Work Phone: 1234567890

Fax Number:

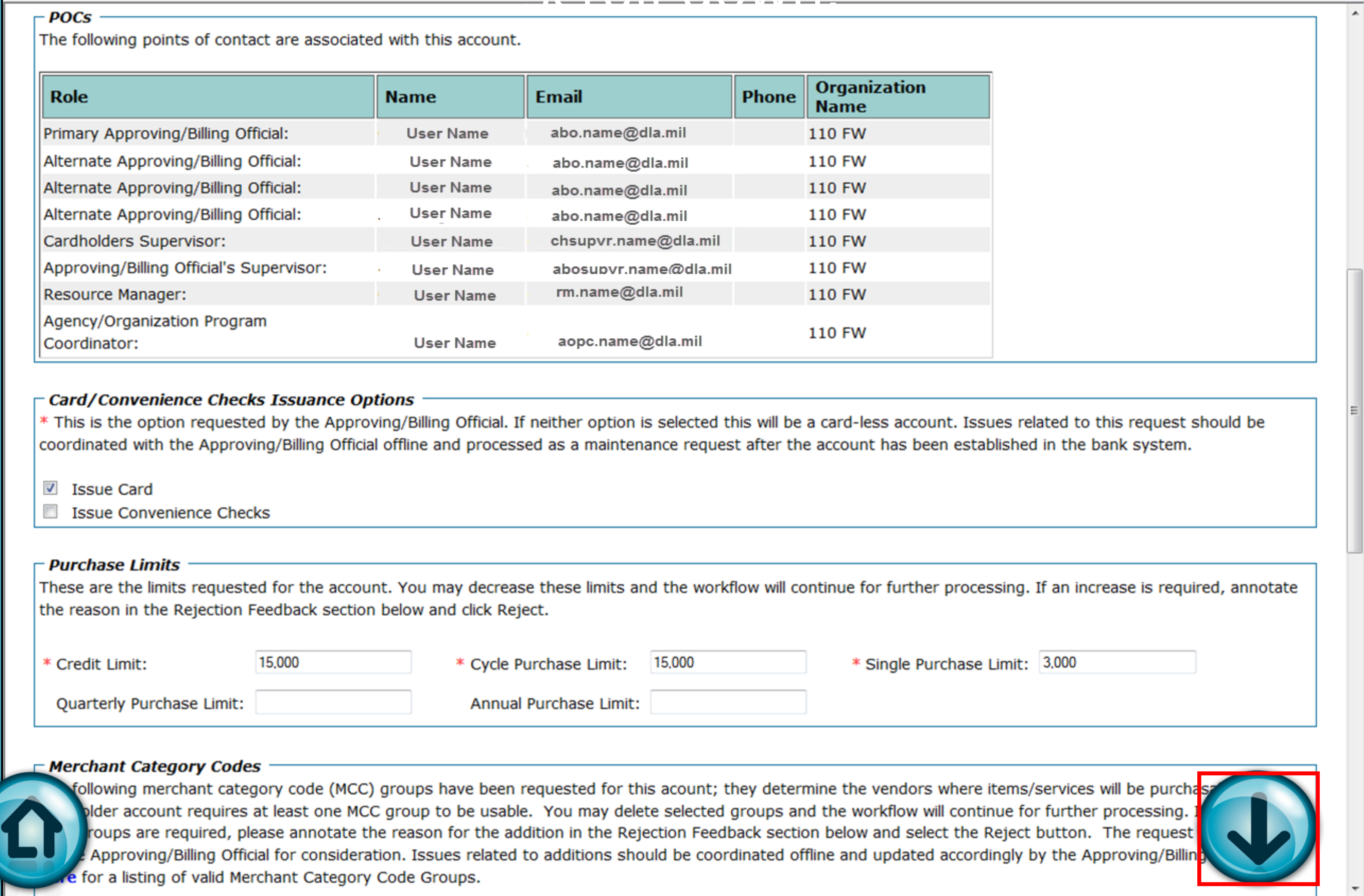
Email Address: cardholder.name@dla.mil

*POCs*

ollowing points of contact are associated with this account.

| e | Name | Email | Phone | Organization Name |
|---|---|---|---|---|

# The A/BO Supervisor verifies that the Cardholder Account information is correct. Click the arrow to scroll down.



***POCs***

The following points of contact are associated with this account.

| Role | Name | Email | Phone | Organization Name |
|---|---|---|---|---|
| Primary Approving/Billing Official: | User Name | abo.name@dla.mil | | 110 FW |
| Alternate Approving/Billing Official: | User Name | abo.name@dla.mil | | 110 FW |
| Alternate Approving/Billing Official: | User Name | abo.name@dla.mil | | 110 FW |
| Alternate Approving/Billing Official: | User Name | abo.name@dla.mil | | 110 FW |
| Cardholders Supervisor: | User Name | chsupvr.name@dla.mil | | 110 FW |
| Approving/Billing Official's Supervisor: | User Name | abosupvr.name@dla.mil | | 110 FW |
| Resource Manager: | User Name | rm.name@dla.mil | | 110 FW |
| Agency/Organization Program Coordinator: | User Name | aopc.name@dla.mil | | 110 FW |

***Card/Convenience Checks Issuance Options***

* This is the option requested by the Approving/Billing Official. If neither option is selected this will be a card-less account. Issues related to this request should be coordinated with the Approving/Billing Official offline and processed as a maintenance request after the account has been established in the bank system.

☑ Issue Card
☐ Issue Convenience Checks

***Purchase Limits***

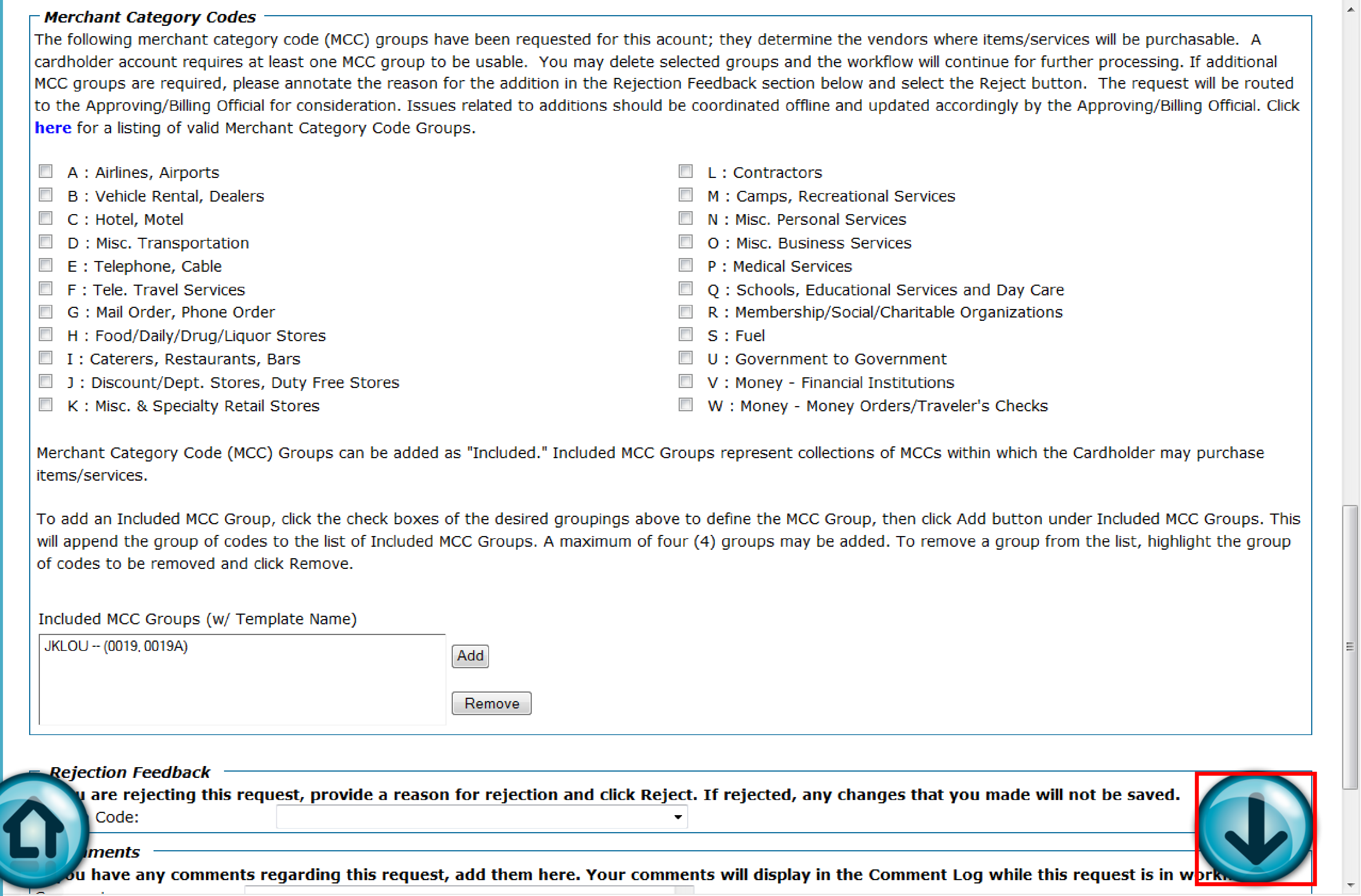
These are the limits requested for the account. You may decrease these limits and the workflow will continue for further processing. If an increase is required, annotate the reason in the Rejection Feedback section below and click Reject.

| | | | | | |
|---|---|---|---|---|---|
| * Credit Limit: | 15,000 | * Cycle Purchase Limit: | 15,000 | * Single Purchase Limit: | 3,000 |
| Quarterly Purchase Limit: | | Annual Purchase Limit: | | | |

***Merchant Category Codes***

following merchant category code (MCC) groups have been requested for this acount; they determine the vendors where items/services will be purchas
older account requires at least one MCC group to be usable. You may delete selected groups and the workflow will continue for further processing. I
roups are required, please annotate the reason for the addition in the Rejection Feedback section below and select the Reject button. The request
Approving/Billing Official for consideration. Issues related to additions should be coordinated offline and updated accordingly by the Approving/Billin
re for a listing of valid Merchant Category Code Groups.

# The A/BO Supervisor verifies that the Cardholder Account information is correct. Click the arrow to scroll down



***Merchant Category Codes***

The following merchant category code (MCC) groups have been requested for this acount; they determine the vendors where items/services will be purchasable. A cardholder account requires at least one MCC group to be usable. You may delete selected groups and the workflow will continue for further processing. If additional MCC groups are required, please annotate the reason for the addition in the Rejection Feedback section below and select the Reject button. The request will be routed to the Approving/Billing Official for consideration. Issues related to additions should be coordinated offline and updated accordingly by the Approving/Billing Official. Click **here** for a listing of valid Merchant Category Code Groups.

☐ A : Airlines, Airports
☐ B : Vehicle Rental, Dealers
☐ C : Hotel, Motel
☐ D : Misc. Transportation
☐ E : Telephone, Cable
☐ F : Tele. Travel Services
☐ G : Mail Order, Phone Order
☐ H : Food/Daily/Drug/Liquor Stores
☐ I : Caterers, Restaurants, Bars
☐ J : Discount/Dept. Stores, Duty Free Stores
☐ K : Misc. & Specialty Retail Stores
☐ L : Contractors
☐ M : Camps, Recreational Services
☐ N : Misc. Personal Services
☐ O : Misc. Business Services
☐ P : Medical Services
☐ Q : Schools, Educational Services and Day Care
☐ R : Membership/Social/Charitable Organizations
☐ S : Fuel
☐ U : Government to Government
☐ V : Money - Financial Institutions
☐ W : Money - Money Orders/Traveler's Checks

Merchant Category Code (MCC) Groups can be added as "Included." Included MCC Groups represent collections of MCCs within which the Cardholder may purchase items/services.

To add an Included MCC Group, click the check boxes of the desired groupings above to define the MCC Group, then click Add button under Included MCC Groups. This will append the group of codes to the list of Included MCC Groups. A maximum of four (4) groups may be added. To remove a group from the list, highlight the group of codes to be removed and click Remove.

Included MCC Groups (w/ Template Name)

JKLOU -- (0019, 0019A)

***Rejection Feedback***

**u are rejecting this request, provide a reason for rejection and click Reject. If rejected, any changes that you made will not be saved.**

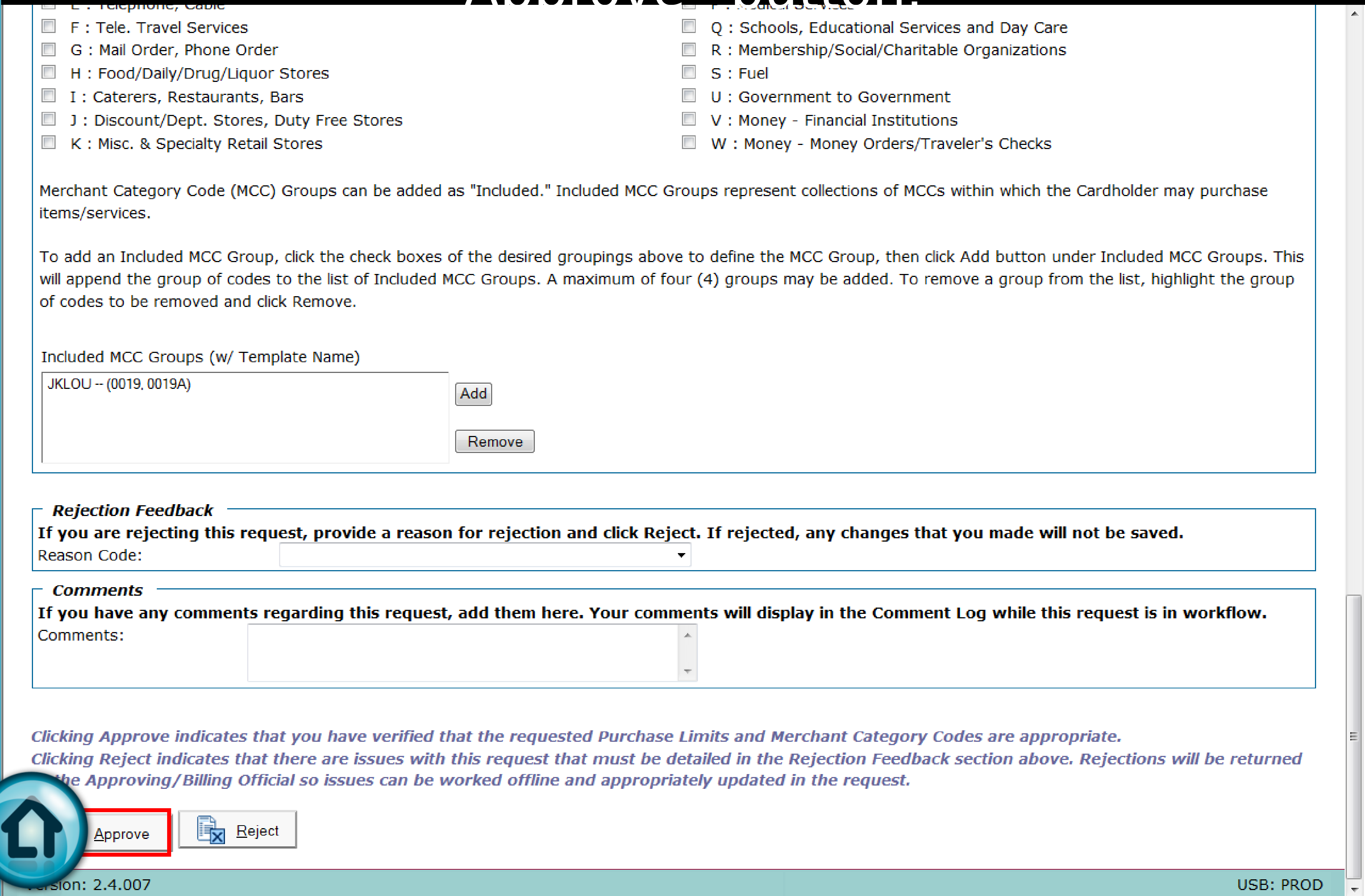
Code:

***ments***

**ou have any comments regarding this request, add them here. Your comments will display in the Comment Log while this request is in w**

## A/BO Supervisor Action 1 AIM: Verify and Approve the New CA

The A/BO Supervisor verifies that the Cardholder Account information is correct. Click the “Approve” button.



☐ F : Tele. Travel Services
☐ G : Mail Order, Phone Order
☐ H : Food/Daily/Drug/Liquor Stores
☐ I : Caterers, Restaurants, Bars
☐ J : Discount/Dept. Stores, Duty Free Stores
☐ K : Misc. & Specialty Retail Stores

☐ Q : Schools, Educational Services and Day Care
☐ R : Membership/Social/Charitable Organizations
☐ S : Fuel
☐ U : Government to Government
☐ V : Money - Financial Institutions
☐ W : Money - Money Orders/Traveler's Checks

Merchant Category Code (MCC) Groups can be added as "Included." Included MCC Groups represent collections of MCCs within which the Cardholder may purchase items/services.

To add an Included MCC Group, click the check boxes of the desired groupings above to define the MCC Group, then click Add button under Included MCC Groups. This will append the group of codes to the list of Included MCC Groups. A maximum of four (4) groups may be added. To remove a group from the list, highlight the group of codes to be removed and click Remove.

Included MCC Groups (w/ Template Name)

JKLOU -- (0019, 0019A)

***Rejection Feedback***

**If you are rejecting this request, provide a reason for rejection and click Reject. If rejected, any changes that you made will not be saved.**

Reason Code:

***Comments***

**If you have any comments regarding this request, add them here. Your comments will display in the Comment Log while this request is in workflow.**

Comments:

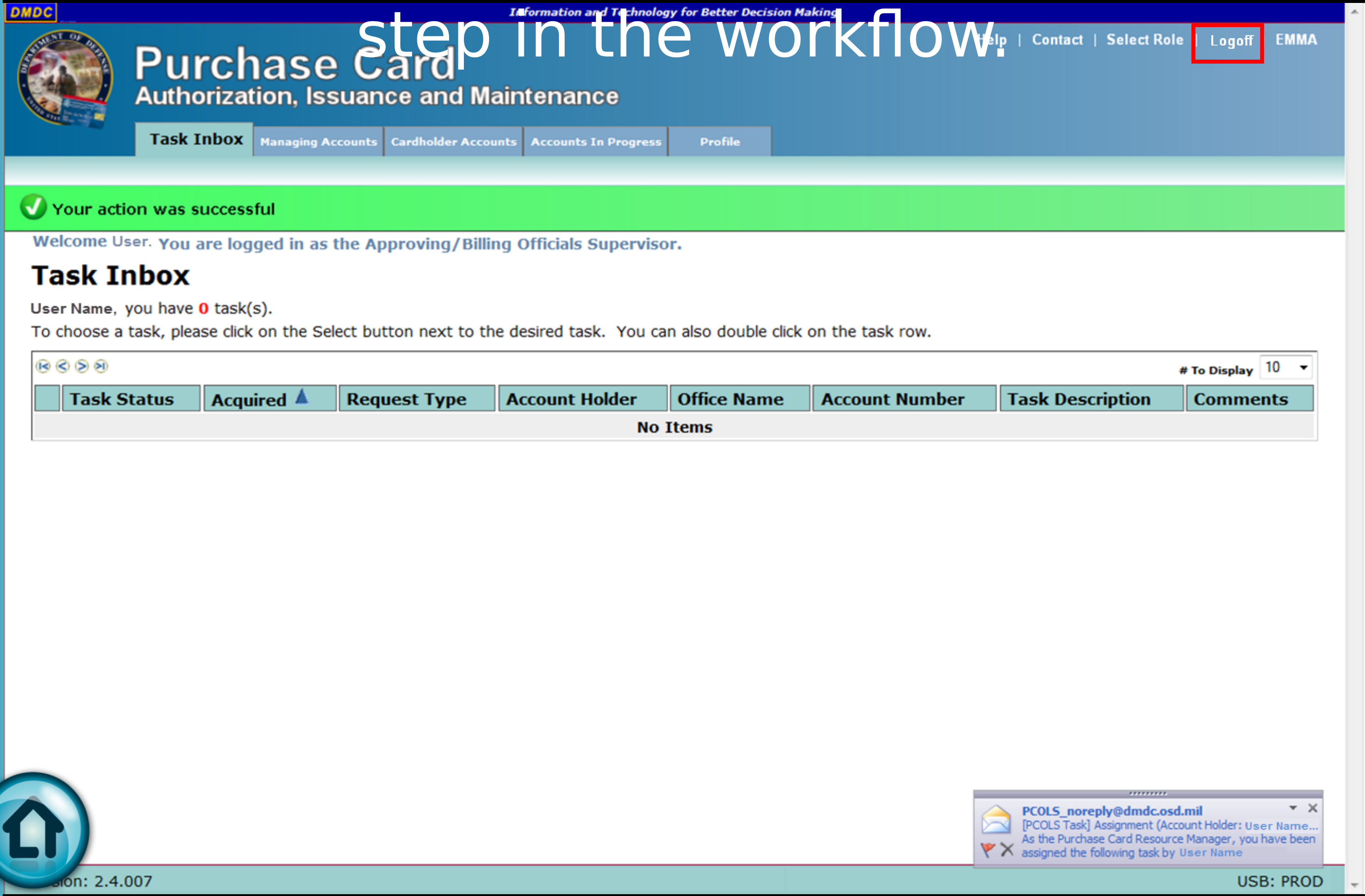
*Clicking Approve indicates that you have verified that the requested Purchase Limits and Merchant Category Codes are appropriate.*
*Clicking Reject indicates that there are issues with this request that must be detailed in the Rejection Feedback section above. Rejections will be returned to the Approving/Billing Official so issues can be worked offline and appropriately updated in the request.*

Version: 2.4.007

USB: PROD

A/BO Supervisor Action 1 AIM: Verify and Approve the New CA

# The action was successful. Click the "Logoff" button to continue to the next step in the workflow.


DMDC
Information and Technology for Better Decision Making
Help | Contact | Select Role | Logoff EMMA
Purchase Card
Authorization, Issuance and Maintenance
Task Inbox
Managing Accounts
Cardholder Accounts
Accounts In Progress
Profile

✓ Your action was successful

Welcome User. You are logged in as the Approving/Billing Officials Supervisor.

## Task Inbox

User Name, you have 0 task(s).

To choose a task, please click on the Select button next to the desired task. You can also double click on the task row.

# To Display 10

| | Task Status | Acquired | Request Type | Account Holder | Office Name | Account Number | Task Description | Comments |
|---|---|---|---|---|---|---|---|---|
| | | | | No Items | | | | |

PCOLS_noreply@dmdc.osd.mil
[PCOLS Task] Assignment (Account Holder: User Name...
As the Purchase Card Resource Manager, you have been assigned the following task by User Name

sion: 2.4.007

USB: PROD

# A/BO Supervisor Action 1

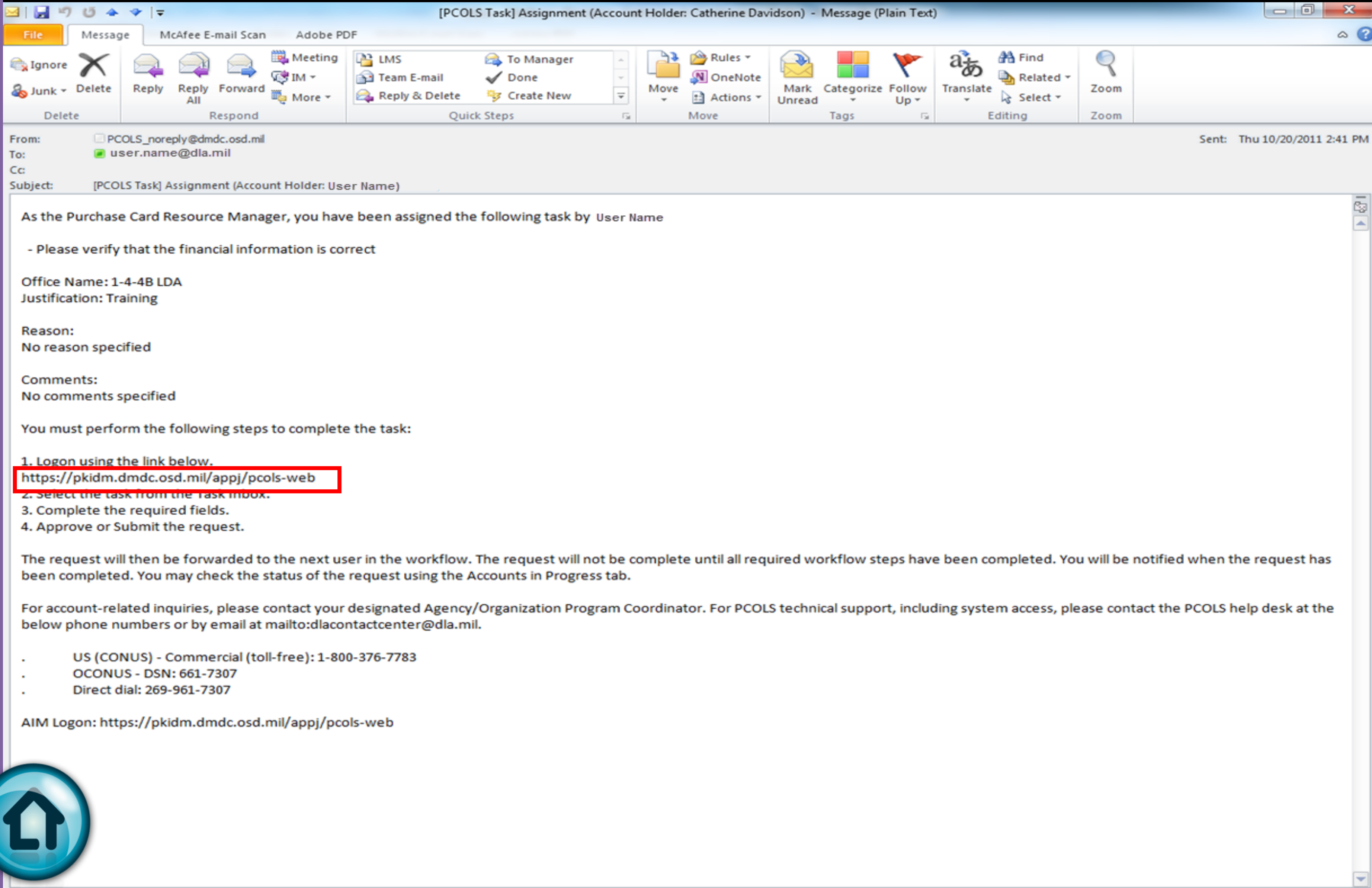
Complete

# RM Action 1

## AIM: Verify Financial Information is Correct

RM Action 1 AIM: Verify Financial Information is Correct

# The RM has received a PCOLS Task email to “verify that the financial information is correct.” Click on the link to complete the task.


[PCOLS Task] Assignment (Account Holder: Catherine Davidson) - Message (Plain Text)
File
Message
McAfee E-mail Scan
Adobe PDF
Ignore
Delete
Junk
Delete
Reply
Reply All
Forward
Meeting
IM
More
Respond
LMS
Team E-mail
Reply & Delete
To Manager
Done
Create New
Quick Steps
Move
Rules
OneNote
Actions
Move
Mark Unread
Categorize
Follow Up
Tags
Translate
Find
Related
Select
Editing
Zoom
Zoom

From: PCOLS_noreply@dmdc.osd.mil
To: user.name@dla.mil
Cc:
Subject: [PCOLS Task] Assignment (Account Holder: User Name)
Sent: Thu 10/20/2011 2:41 PM

As the Purchase Card Resource Manager, you have been assigned the following task by User Name

- Please verify that the financial information is correct

Office Name: 1-4-4B LDA
Justification: Training

Reason:
No reason specified

Comments:
No comments specified

You must perform the following steps to complete the task:

1. Logon using the link below.
https://pkidm.dmdc.osd.mil/appj/pcols-web
2. Select the task from the Task Inbox.
3. Complete the required fields.
4. Approve or Submit the request.

The request will then be forwarded to the next user in the workflow. The request will not be complete until all required workflow steps have been completed. You will be notified when the request has been completed. You may check the status of the request using the Accounts in Progress tab.

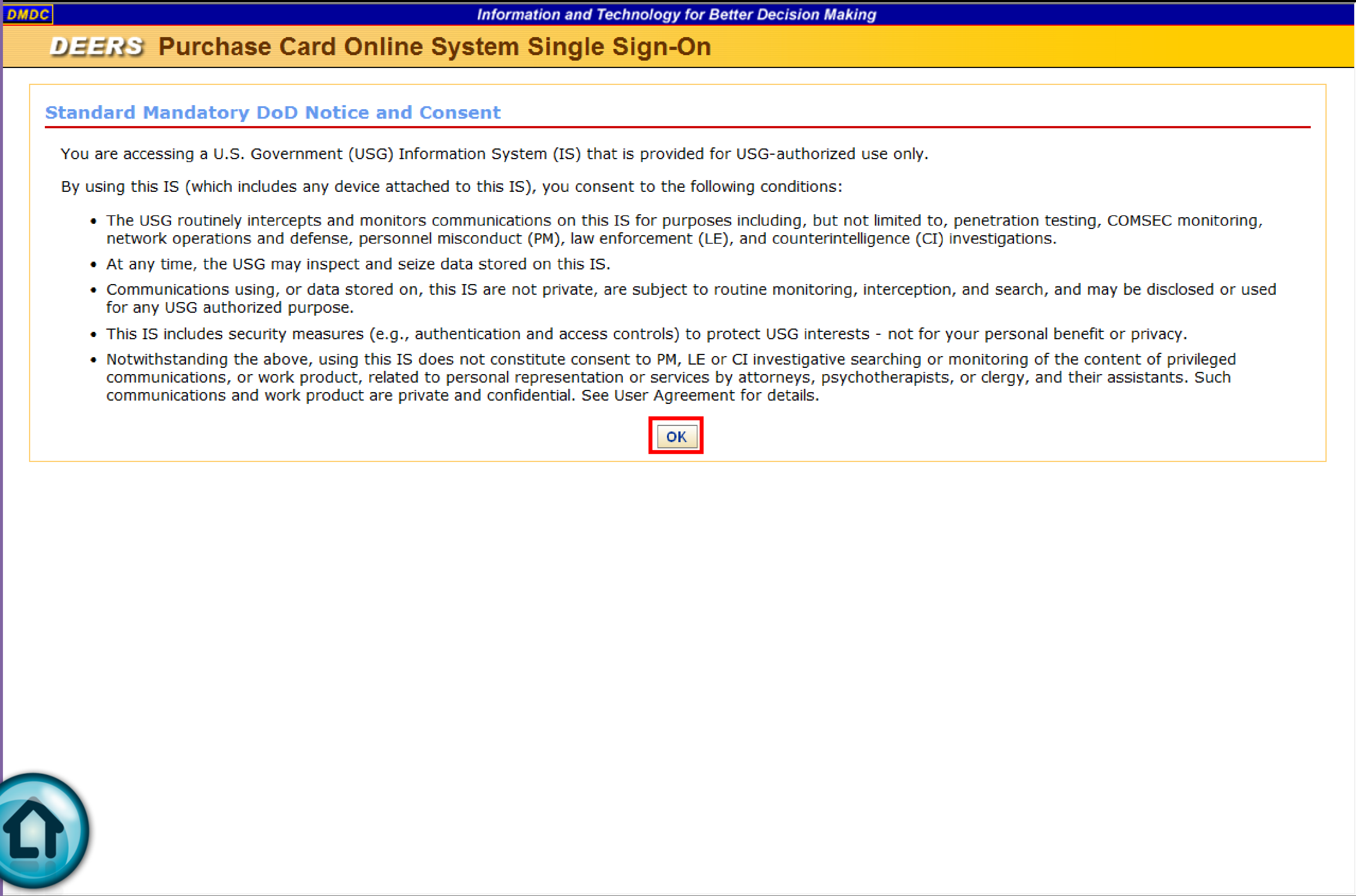
For account-related inquiries, please contact your designated Agency/Organization Program Coordinator. For PCOLS technical support, including system access, please contact the PCOLS help desk at the below phone numbers or by email at mailto:dlacontactcenter@dla.mil.

. US (CONUS) - Commercial (toll-free): 1-800-376-7783
. OCONUS - DSN: 661-7307
. Direct dial: 269-961-7307

AIM Logon: https://pkidm.dmdc.osd.mil/appj/pcols-web

# Click the “OK” button.

RM: Action 1 – AIM: Verify Financial Information is Correct



DMDC
Information and Technology for Better Decision Making
DEERS Purchase Card Online System Single Sign-On

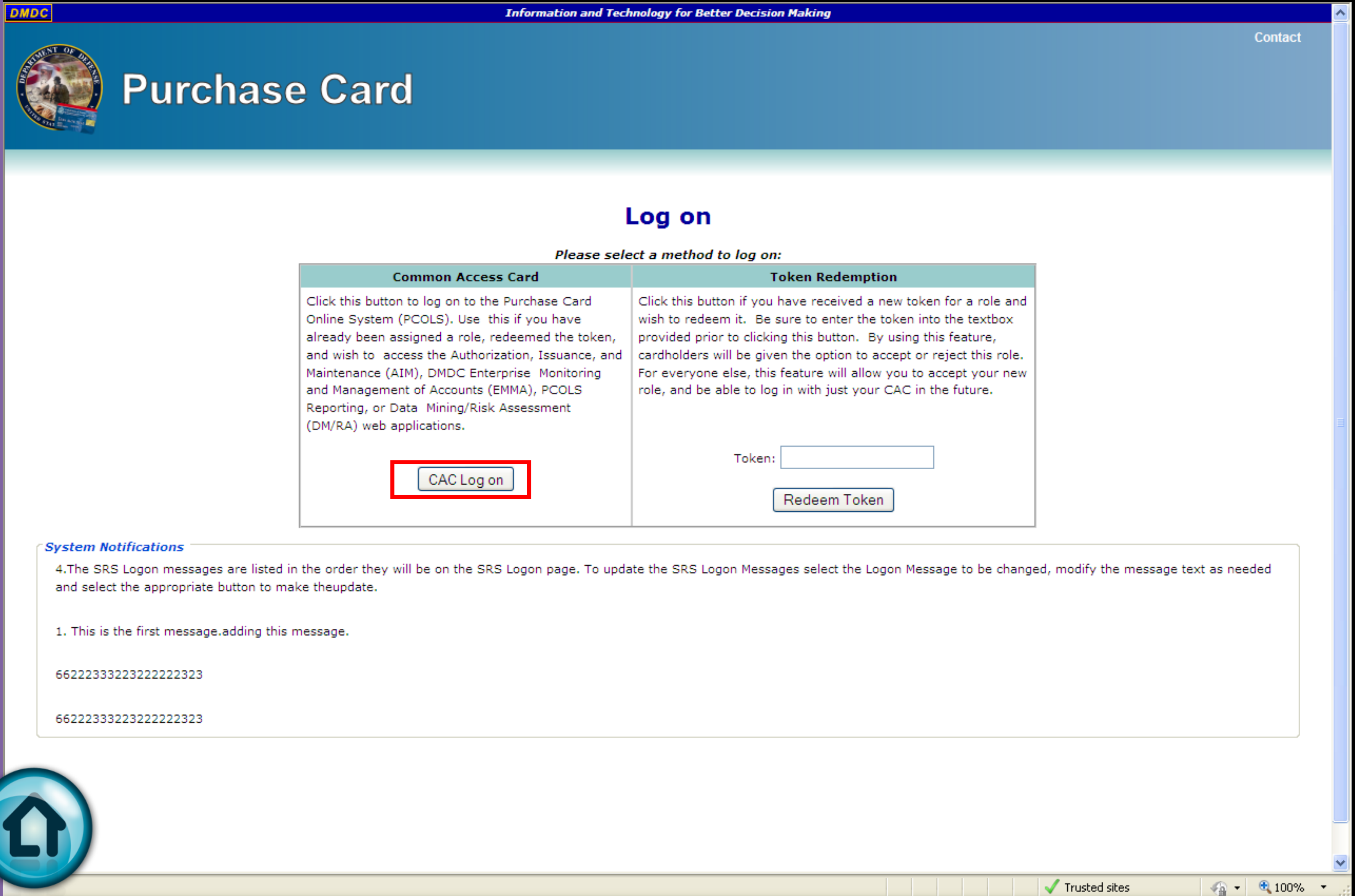
## Standard Mandatory DoD Notice and Consent

You are accessing a U.S. Government (USG) Information System (IS) that is provided for USG-authorized use only.

By using this IS (which includes any device attached to this IS), you consent to the following conditions:

- The USG routinely intercepts and monitors communications on this IS for purposes including, but not limited to, penetration testing, COMSEC monitoring, network operations and defense, personnel misconduct (PM), law enforcement (LE), and counterintelligence (CI) investigations.
- At any time, the USG may inspect and seize data stored on this IS.
- Communications using, or data stored on, this IS are not private, are subject to routine monitoring, interception, and search, and may be disclosed or used for any USG authorized purpose.
- This IS includes security measures (e.g., authentication and access controls) to protect USG interests - not for your personal benefit or privacy.
- Notwithstanding the above, using this IS does not constitute consent to PM, LE or CI investigative searching or monitoring of the content of privileged communications, or work product, related to personal representation or services by attorneys, psychotherapists, or clergy, and their assistants. Such communications and work product are private and confidential. See User Agreement for details.

# Click the “CAC Log on” button



## Log on

***Please select a method to log on:***

| Common Access Card | Token Redemption |
|---|---|
| Click this button to log on to the Purchase Card Online System (PCOLS). Use this if you have already been assigned a role, redeemed the token, and wish to access the Authorization, Issuance, and Maintenance (AIM), DMDC Enterprise Monitoring and Management of Accounts (EMMA), PCOLS Reporting, or Data Mining/Risk Assessment (DM/RA) web applications. | Click this button if you have received a new token for a role and wish to redeem it. Be sure to enter the token into the textbox provided prior to clicking this button. By using this feature, cardholders will be given the option to accept or reject this role. For everyone else, this feature will allow you to accept your new role, and be able to log in with just your CAC in the future. |
| CAC Log on | Token: ☐<br>Redeem Token |

***System Notifications***

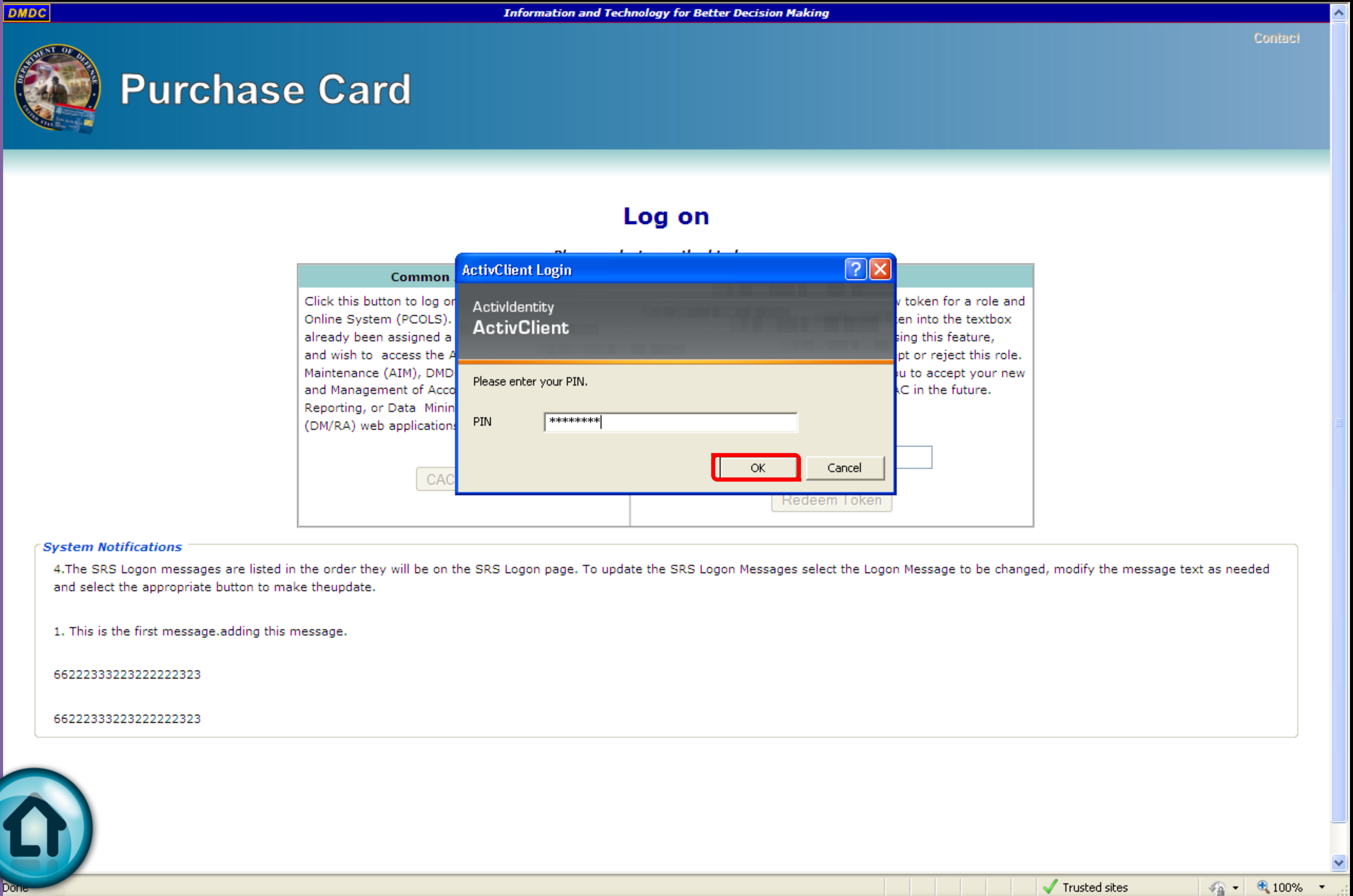
4.The SRS Logon messages are listed in the order they will be on the SRS Logon page. To update the SRS Logon Messages select the Logon Message to be changed, modify the message text as needed and select the appropriate button to make theupdate.

1. This is the first message.adding this message.

66222333223222222323

66222333223222222323

# The RM enters their PIN. Click the “OK” button.


DMDC
Information and Technology for Better Decision Making
Contact
Purchase Card
ActivClient Login
ActivIdentity
ActivClient
OK
Cancel
CAC
Redeem Token
Done
Trusted sites
100%

Log on

Common

Click this button to log or Online System (PCOLS). already been assigned a and wish to access the A Maintenance (AIM), DMD and Management of Acco Reporting, or Data Minin (DM/RA) web application

token for a role and en into the textbox ing this feature, pt or reject this role. u to accept your new C in the future.

Please enter your PIN.

PIN ********

System Notifications

4.The SRS Logon messages are listed in the order they will be on the SRS Logon page. To update the SRS Logon Messages select the Logon Message to be changed, modify the message text as needed and select the appropriate button to make theupdate.

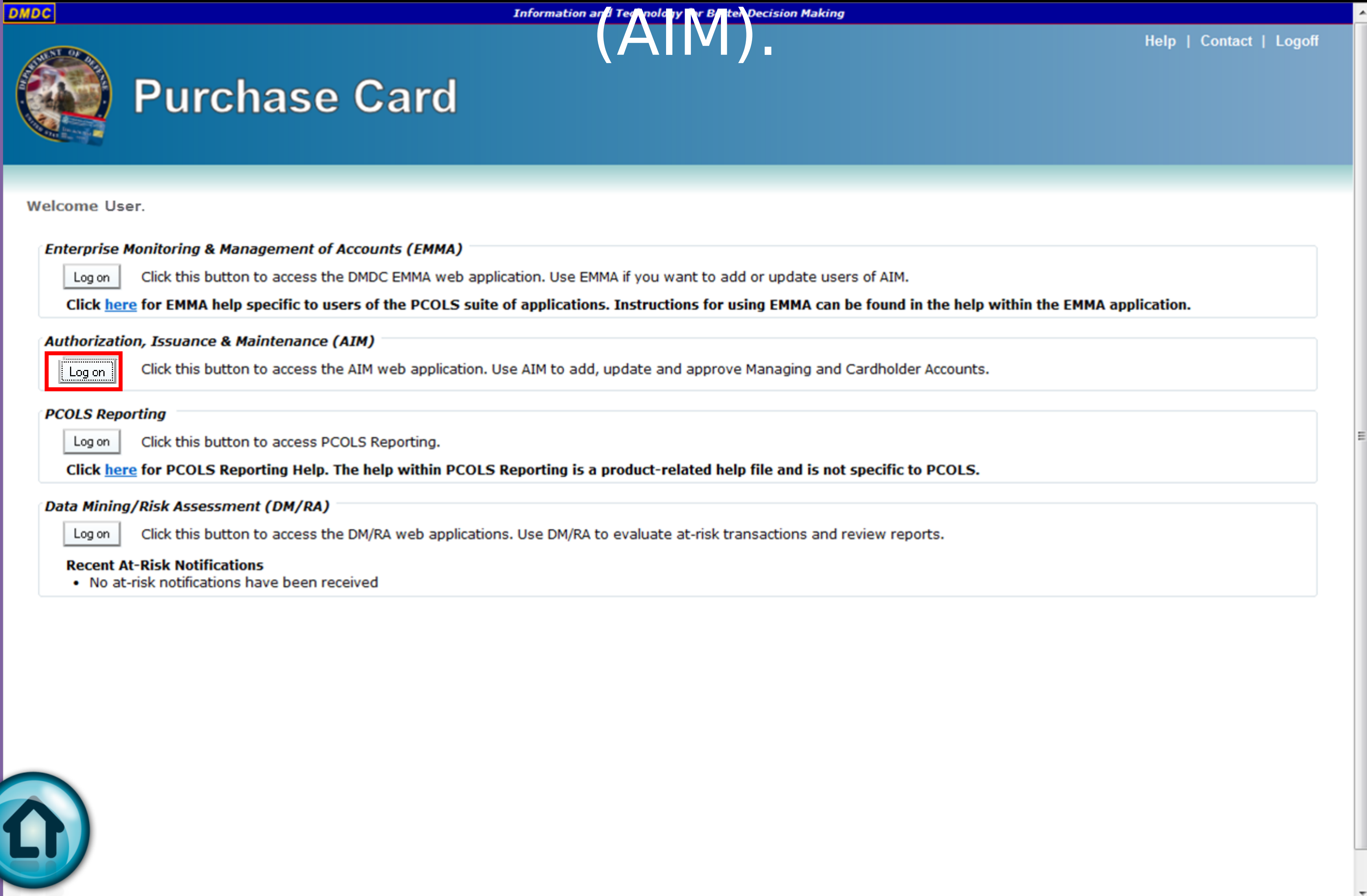
1. This is the first message.adding this message.

66222333223222222323

66222333223222222323

RM: Action 1 AIM: Verify Financial Information is Correct

# Click on the "Log on" button for Authorization, Issuance & Maintenance (AIM).



Welcome User.

***Enterprise Monitoring & Management of Accounts (EMMA)***

Log on — Click this button to access the DMDC EMMA web application. Use EMMA if you want to add or update users of AIM.

**Click here for EMMA help specific to users of the PCOLS suite of applications. Instructions for using EMMA can be found in the help within the EMMA application.**

***Authorization, Issuance & Maintenance (AIM)***

Log on — Click this button to access the AIM web application. Use AIM to add, update and approve Managing and Cardholder Accounts.

***PCOLS Reporting***

Log on — Click this button to access PCOLS Reporting.

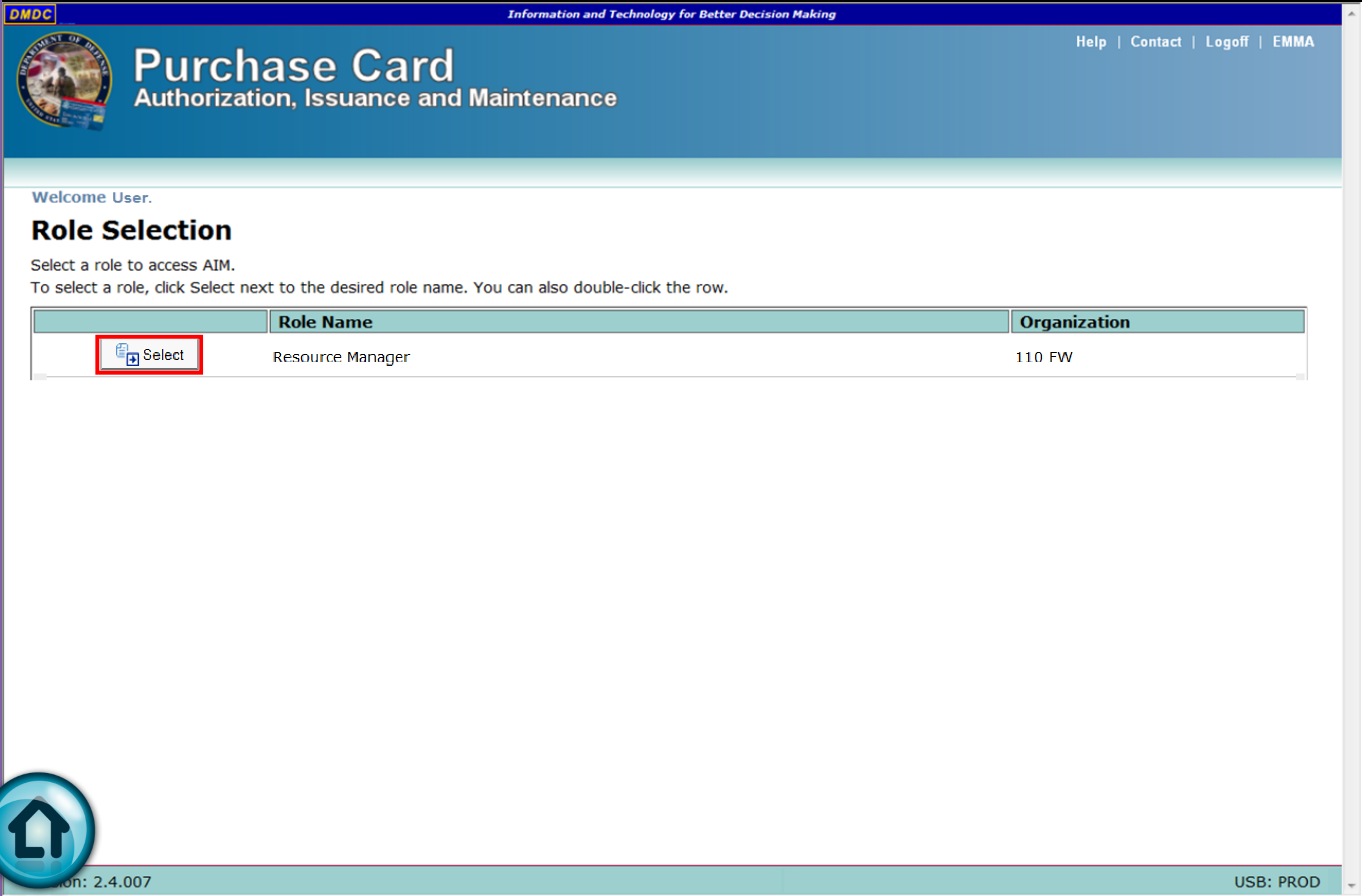
**Click here for PCOLS Reporting Help. The help within PCOLS Reporting is a product-related help file and is not specific to PCOLS.**

***Data Mining/Risk Assessment (DM/RA)***

Log on — Click this button to access the DM/RA web applications. Use DM/RA to evaluate at-risk transactions and review reports.

**Recent At-Risk Notifications**
- No at-risk notifications have been received

# Click the “Select” button for the Resource Manager role for 110FW.



DMDC
Information and Technology for Better Decision Making
Help | Contact | Logoff | EMMA

Purchase Card

Authorization, Issuance and Maintenance

Welcome User.

**Role Selection**

Select a role to access AIM.

To select a role, click Select next to the desired role name. You can also double-click the row.

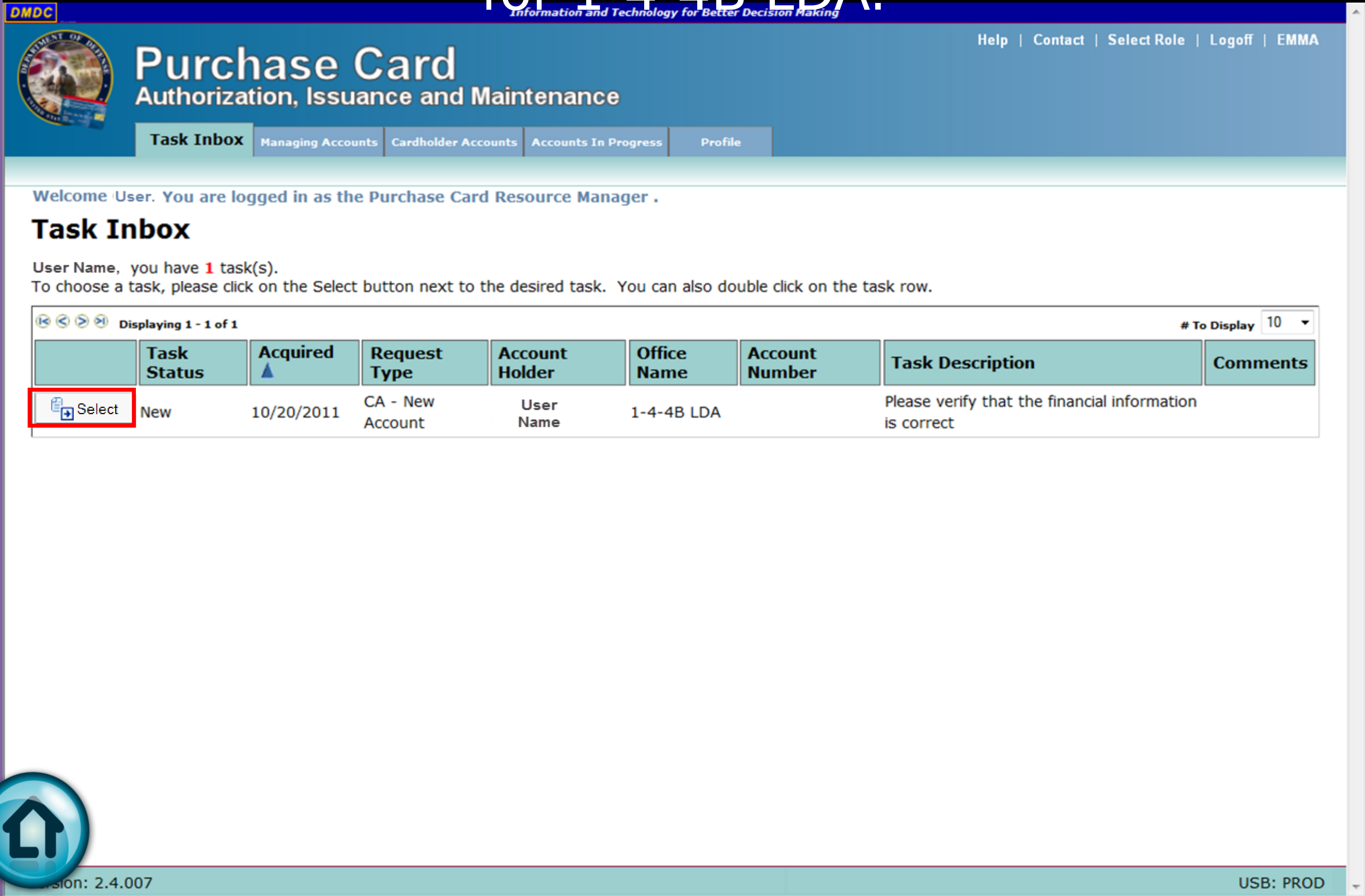
| | Role Name | Organization |
|---|---|---|
| Select | Resource Manager | 110 FW |

ion: 2.4.007

USB: PROD

RM Action 1 AIM: Verify Financial Information is Correct

# The RM has been directed to their Task Inbox. Click on the “Select” button to view the new task for 1-4-4B LDA.


DMDC
Information and Technology for Better Decision Making
Help | Contact | Select Role | Logoff | EMMA
Purchase Card
Authorization, Issuance and Maintenance
Task Inbox
Managing Accounts
Cardholder Accounts
Accounts In Progress
Profile

Welcome User. You are logged in as the Purchase Card Resource Manager .

Task Inbox

User Name, you have 1 task(s).
To choose a task, please click on the Select button next to the desired task. You can also double click on the task row.

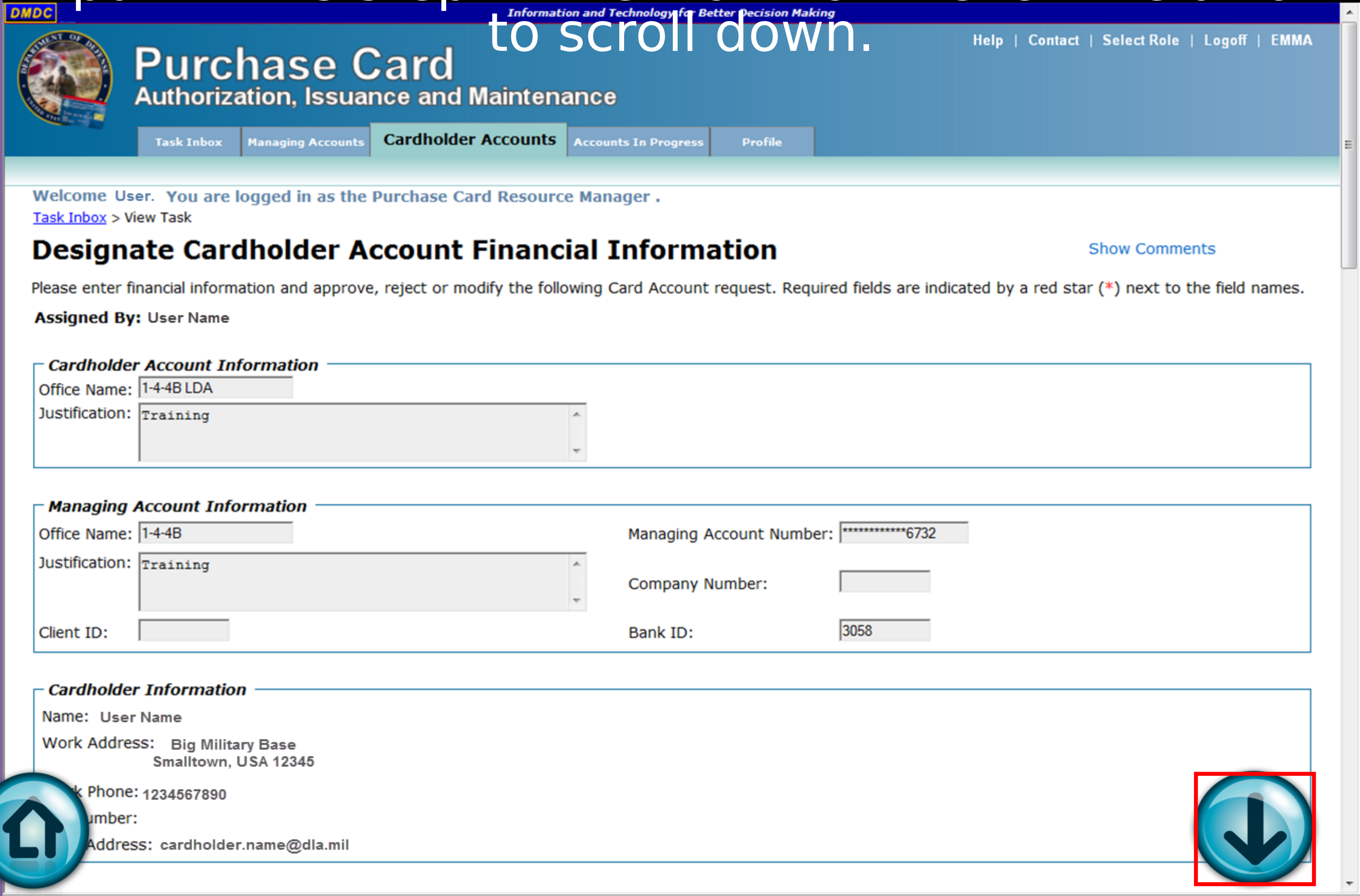
Displaying 1 - 1 of 1 # To Display 10

| | Task Status | Acquired | Request Type | Account Holder | Office Name | Account Number | Task Description | Comments |
|---|---|---|---|---|---|---|---|---|
| Select | New | 10/20/2011 | CA - New Account | User Name | 1-4-4B LDA | | Please verify that the financial information is correct | |

Version: 2.4.007 USB: PROD

# RM Action 1 AIM: Verify Financial Information is Correct

The RM verifies that the financial information is correct. Nothing additional is required to be input in this step in the workflow. Click the arrow to scroll down.



DMDC
Information and Technology for Better Decision Making
Help | Contact | Select Role | Logoff | EMMA
Purchase Card
Authorization, Issuance and Maintenance
Task Inbox
Managing Accounts
Cardholder Accounts
Accounts In Progress
Profile

Welcome User. You are logged in as the Purchase Card Resource Manager .

Task Inbox > View Task

**Designate Cardholder Account Financial Information**

Show Comments

Please enter financial information and approve, reject or modify the following Card Account request. Required fields are indicated by a red star (*) next to the field names.

**Assigned By:** User Name

***Cardholder Account Information***

Office Name: 1-4-4B LDA

Justification: Training

***Managing Account Information***

Office Name: 1-4-4B

Justification: Training

Client ID:

Managing Account Number: ************6732

Company Number:

Bank ID: 3058

***Cardholder Information***

Name: User Name

Work Address: Big Military Base
Smalltown, USA 12345

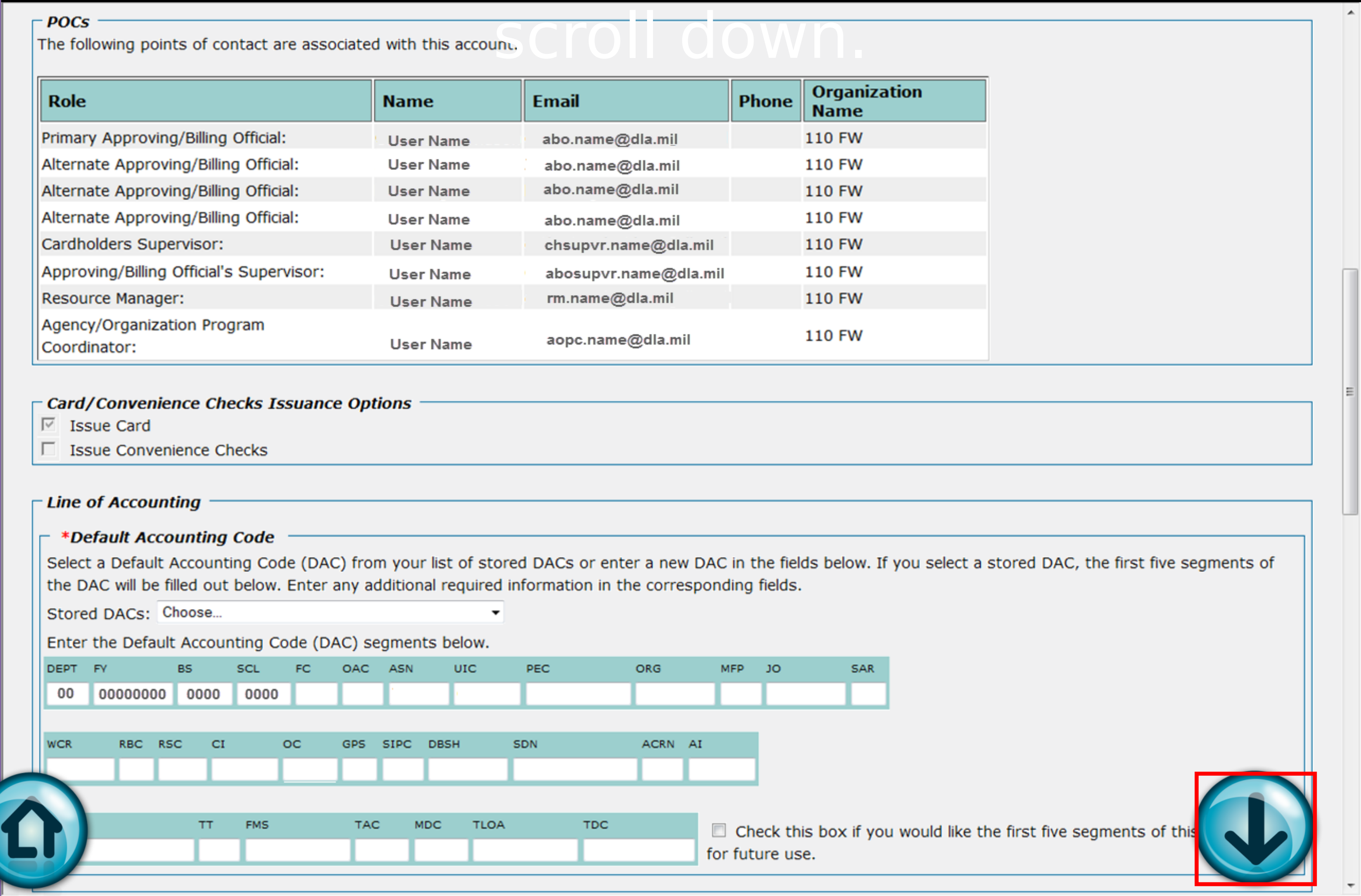
k Phone: 1234567890

umber:

Address: cardholder.name@dla.mil

**RM Action 1 AIM: Verify Financial Information is Correct**

# The RM verifies that the financial information is correct. Click the arrow to scroll down.



***POCs***

The following points of contact are associated with this account.

| Role | Name | Email | Phone | Organization Name |
|---|---|---|---|---|
| Primary Approving/Billing Official: | User Name | abo.name@dla.mil | | 110 FW |
| Alternate Approving/Billing Official: | User Name | abo.name@dla.mil | | 110 FW |
| Alternate Approving/Billing Official: | User Name | abo.name@dla.mil | | 110 FW |
| Alternate Approving/Billing Official: | User Name | abo.name@dla.mil | | 110 FW |
| Cardholders Supervisor: | User Name | chsupvr.name@dla.mil | | 110 FW |
| Approving/Billing Official's Supervisor: | User Name | abosupvr.name@dla.mil | | 110 FW |
| Resource Manager: | User Name | rm.name@dla.mil | | 110 FW |
| Agency/Organization Program Coordinator: | User Name | aopc.name@dla.mil | | 110 FW |

***Card/Convenience Checks Issuance Options***

☑ Issue Card

☐ Issue Convenience Checks

***Line of Accounting***

****Default Accounting Code***

Select a Default Accounting Code (DAC) from your list of stored DACs or enter a new DAC in the fields below. If you select a stored DAC, the first five segments of the DAC will be filled out below. Enter any additional required information in the corresponding fields.

Stored DACs: Choose...

Enter the Default Accounting Code (DAC) segments below.

| DEPT | FY | BS | SCL | FC | OAC | ASN | UIC | PEC | ORG | MFP | JO | SAR |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 00 | 00000000 | 0000 | 0000 | | | | | | | | | |

| WCR | RBC | RSC | CI | OC | GPS | SIPC | DBSH | SDN | ACRN | AI |
|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | | | |

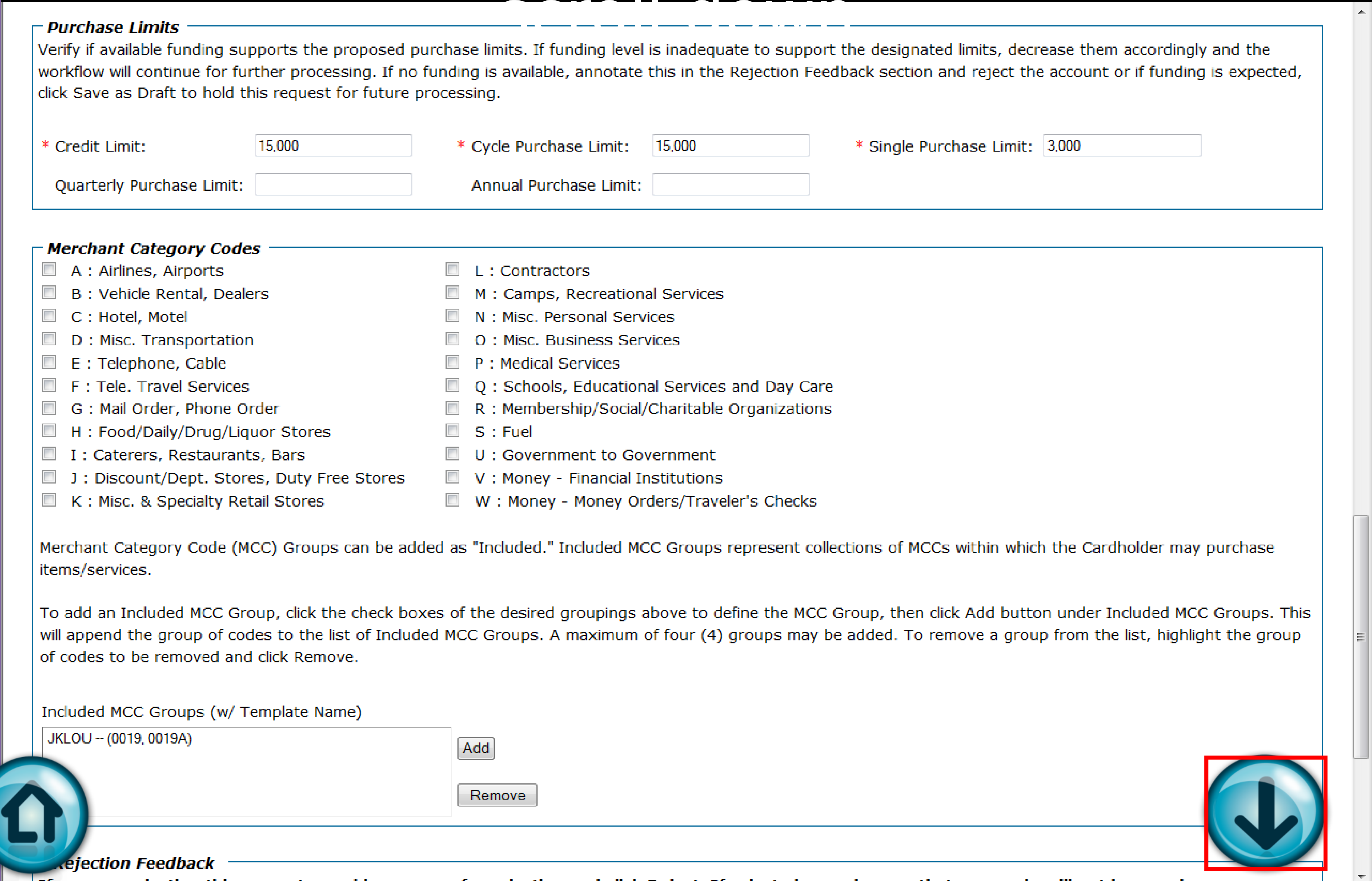
| TT | FMS | TAC | MDC | TLOA | TDC |
|---|---|---|---|---|---|
| | | | | | |

☐ Check this box if you would like the first five segments of this

for future use.

# RM Action 1 AIM: Verify Financial Information is Correct

# The RM verifies that the financial information is correct. Click the arrow to scroll down



***Purchase Limits***

Verify if available funding supports the proposed purchase limits. If funding level is inadequate to support the designated limits, decrease them accordingly and the workflow will continue for further processing. If no funding is available, annotate this in the Rejection Feedback section and reject the account or if funding is expected, click Save as Draft to hold this request for future processing.

| | | | | | |
|---|---|---|---|---|---|
| * Credit Limit: | 15,000 | * Cycle Purchase Limit: | 15,000 | * Single Purchase Limit: | 3,000 |
| Quarterly Purchase Limit: | | Annual Purchase Limit: | | | |

***Merchant Category Codes***

- ☐ A : Airlines, Airports
- ☐ B : Vehicle Rental, Dealers
- ☐ C : Hotel, Motel
- ☐ D : Misc. Transportation
- ☐ E : Telephone, Cable
- ☐ F : Tele. Travel Services
- ☐ G : Mail Order, Phone Order
- ☐ H : Food/Daily/Drug/Liquor Stores
- ☐ I : Caterers, Restaurants, Bars
- ☐ J : Discount/Dept. Stores, Duty Free Stores
- ☐ K : Misc. & Specialty Retail Stores
- ☐ L : Contractors
- ☐ M : Camps, Recreational Services
- ☐ N : Misc. Personal Services
- ☐ O : Misc. Business Services
- ☐ P : Medical Services
- ☐ Q : Schools, Educational Services and Day Care
- ☐ R : Membership/Social/Charitable Organizations
- ☐ S : Fuel
- ☐ U : Government to Government
- ☐ V : Money - Financial Institutions
- ☐ W : Money - Money Orders/Traveler's Checks

Merchant Category Code (MCC) Groups can be added as "Included." Included MCC Groups represent collections of MCCs within which the Cardholder may purchase items/services.

To add an Included MCC Group, click the check boxes of the desired groupings above to define the MCC Group, then click Add button under Included MCC Groups. This will append the group of codes to the list of Included MCC Groups. A maximum of four (4) groups may be added. To remove a group from the list, highlight the group of codes to be removed and click Remove.

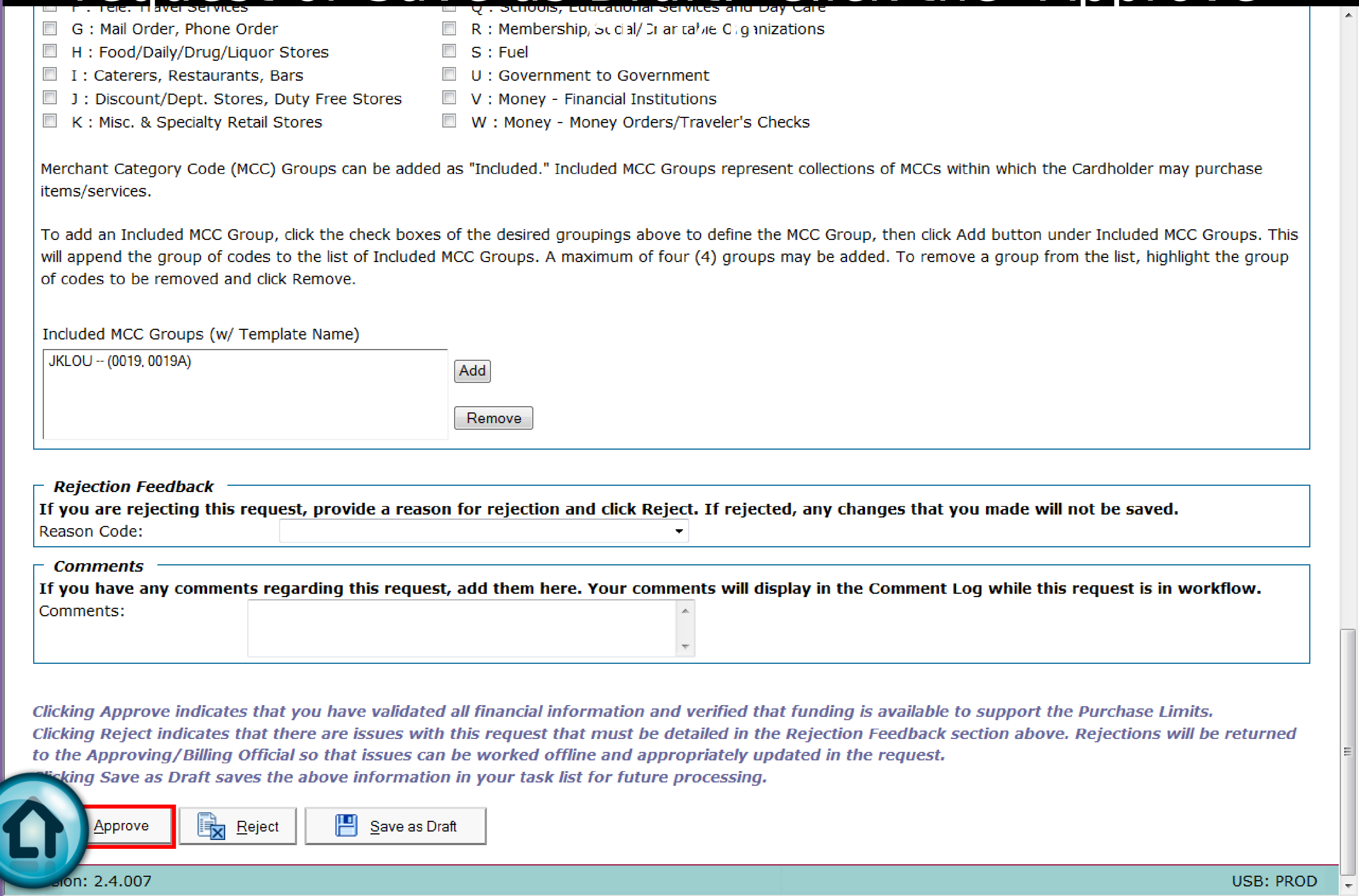
Included MCC Groups (w/ Template Name)

JKLOU -- (0019, 0019A)

***Rejection Feedback***

## RM: Action 1 AIM: Verify Financial Information is Correct

The RM verifies that the financial information is correct. The RM has the option to Reject the request or Save as Draft. Click the "Approve"



☐ F : Tele. Travel Services
☐ G : Mail Order, Phone Order
☐ H : Food/Daily/Drug/Liquor Stores
☐ I : Caterers, Restaurants, Bars
☐ J : Discount/Dept. Stores, Duty Free Stores
☐ K : Misc. & Specialty Retail Stores

☐ Q : Schools, Educational Services and Day Care
☐ R : Membership, Social/Charitable Organizations
☐ S : Fuel
☐ U : Government to Government
☐ V : Money - Financial Institutions
☐ W : Money - Money Orders/Traveler's Checks

Merchant Category Code (MCC) Groups can be added as "Included." Included MCC Groups represent collections of MCCs within which the Cardholder may purchase items/services.

To add an Included MCC Group, click the check boxes of the desired groupings above to define the MCC Group, then click Add button under Included MCC Groups. This will append the group of codes to the list of Included MCC Groups. A maximum of four (4) groups may be added. To remove a group from the list, highlight the group of codes to be removed and click Remove.

Included MCC Groups (w/ Template Name)

JKLOU -- (0019, 0019A)

***Rejection Feedback***

**If you are rejecting this request, provide a reason for rejection and click Reject. If rejected, any changes that you made will not be saved.**

Reason Code:

***Comments***

**If you have any comments regarding this request, add them here. Your comments will display in the Comment Log while this request is in workflow.**

Comments:

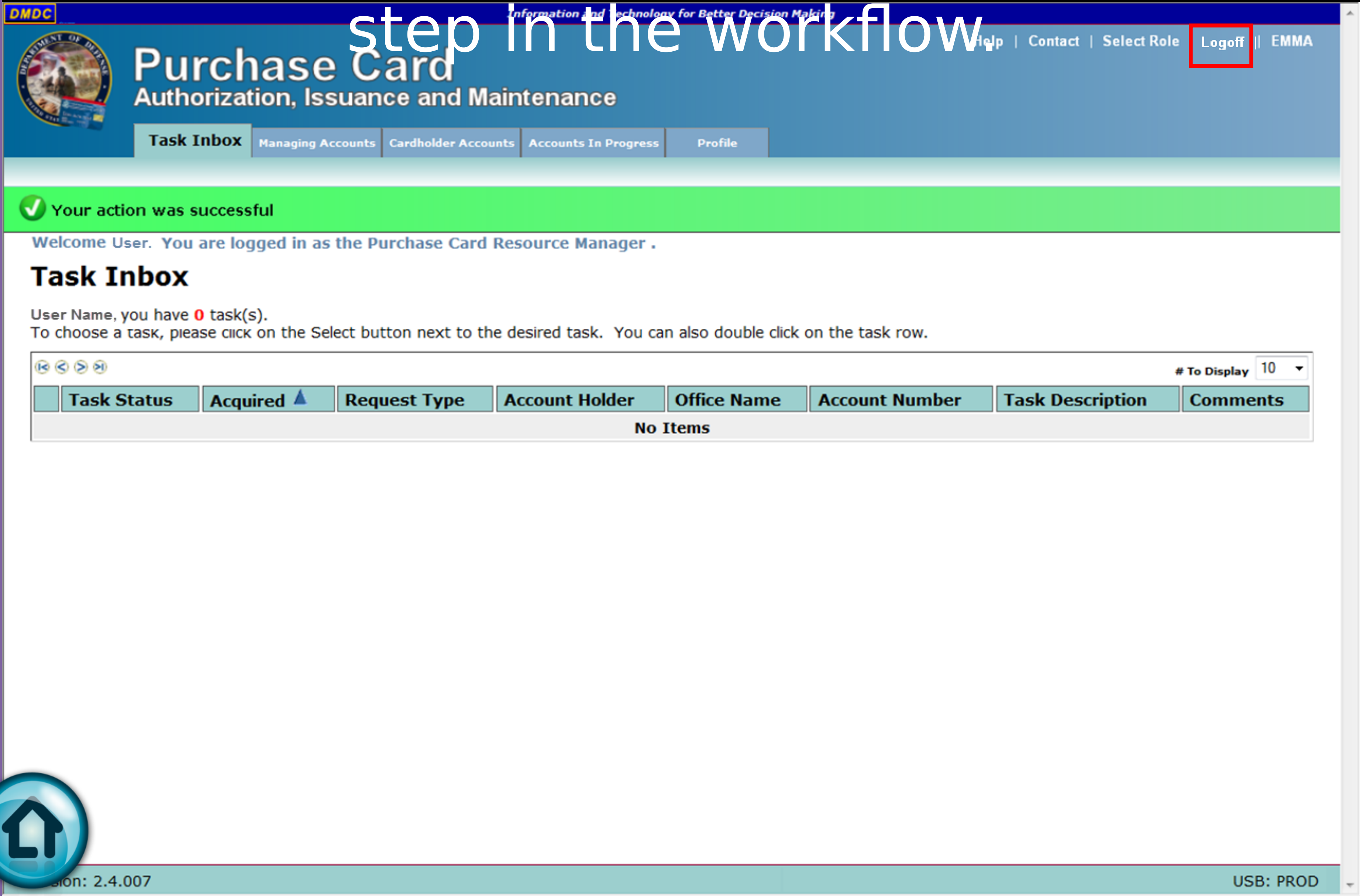
*Clicking Approve indicates that you have validated all financial information and verified that funding is available to support the Purchase Limits.*
*Clicking Reject indicates that there are issues with this request that must be detailed in the Rejection Feedback section above. Rejections will be returned to the Approving/Billing Official so that issues can be worked offline and appropriately updated in the request.*
*Clicking Save as Draft saves the above information in your task list for future processing.*

sion: 2.4.007

USB: PROD

# RM: Action 1 – AIM: Verify Financial Information is Correct

The action was successful. Click the "Logoff" button to continue to the next step in the workflow.


DMDC
Information and Technology for Better Decision Making
Help | Contact | Select Role | Logoff || EMMA
Purchase Card
Authorization, Issuance and Maintenance
Task Inbox
Managing Accounts
Cardholder Accounts
Accounts In Progress
Profile

✓ Your action was successful

Welcome User. You are logged in as the Purchase Card Resource Manager .

**Task Inbox**

User Name, you have 0 task(s).
To choose a task, please click on the Select button next to the desired task. You can also double click on the task row.

# To Display 10

| | Task Status | Acquired ▲ | Request Type | Account Holder | Office Name | Account Number | Task Description | Comments |
|---|---|---|---|---|---|---|---|---|
| No Items | | | | | | | | |

sion: 2.4.007

USB: PROD

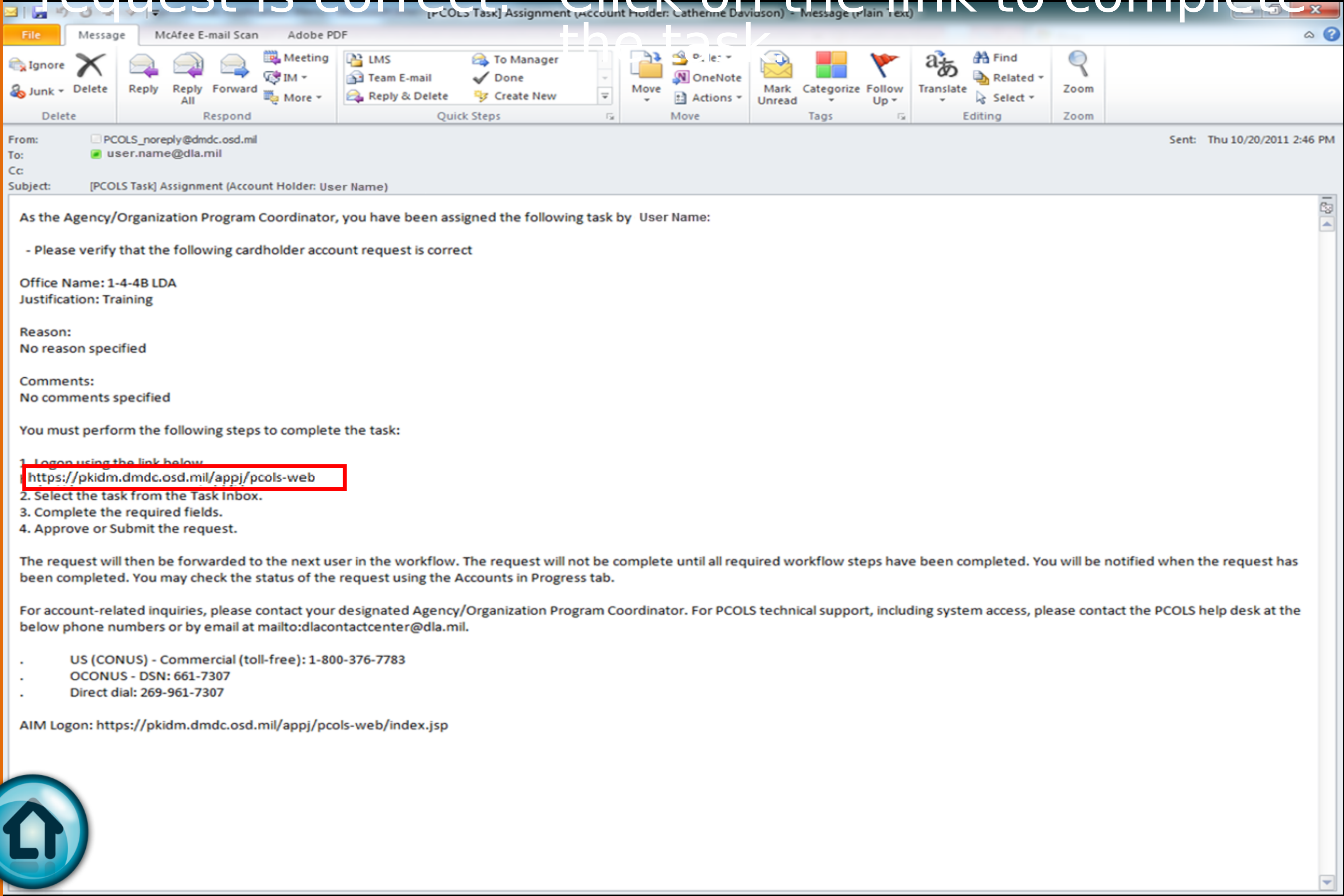
# RM Action 1
Complete

# A/OPC Action 2

# AIM: Verify Cardholder Account Information is Correct

# A/OPC Action 2 AIM: Verify CA Information is Correct

# The A/OPC has received a PCOLS Task email to “verify that the following cardholder account request is correct.” Click on the link to complete the task


[PCOLS Task] Assignment (Account Holder: Catherine Davidson) - Message (Plain Text)
File
Message
McAfee E-mail Scan
Adobe PDF
Ignore
Junk
Delete
Reply
Reply All
Forward
Meeting
IM
More
Respond
LMS
Team E-mail
Reply & Delete
To Manager
Done
Create New
Quick Steps
Move
OneNote
Actions
Mark Unread
Categorize
Follow Up
Tags
Translate
Find
Related
Select
Editing
Zoom

From: PCOLS_noreply@dmdc.osd.mil
To: user.name@dla.mil
Cc:
Subject: [PCOLS Task] Assignment (Account Holder: User Name)

Sent: Thu 10/20/2011 2:46 PM

As the Agency/Organization Program Coordinator, you have been assigned the following task by User Name:

- Please verify that the following cardholder account request is correct

Office Name: 1-4-4B LDA
Justification: Training

Reason:
No reason specified

Comments:
No comments specified

You must perform the following steps to complete the task:

1. Logon using the link below.
https://pkidm.dmdc.osd.mil/appj/pcols-web
2. Select the task from the Task Inbox.
3. Complete the required fields.
4. Approve or Submit the request.

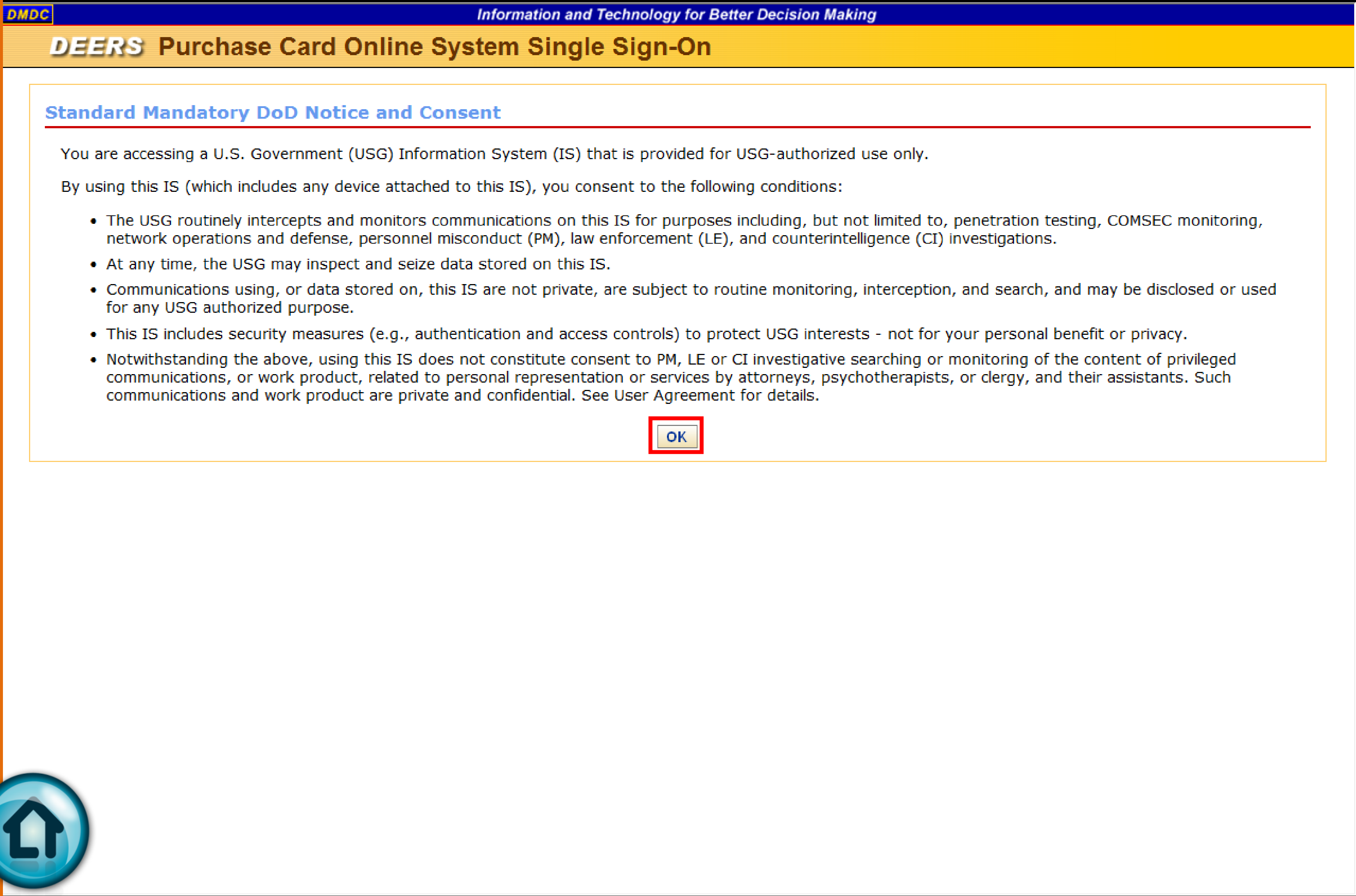
The request will then be forwarded to the next user in the workflow. The request will not be complete until all required workflow steps have been completed. You will be notified when the request has been completed. You may check the status of the request using the Accounts in Progress tab.

For account-related inquiries, please contact your designated Agency/Organization Program Coordinator. For PCOLS technical support, including system access, please contact the PCOLS help desk at the below phone numbers or by email at mailto:dlacontactcenter@dla.mil.

- US (CONUS) - Commercial (toll-free): 1-800-376-7783
- OCONUS - DSN: 661-7307
- Direct dial: 269-961-7307

AIM Logon: https://pkidm.dmdc.osd.mil/appj/pcols-web/index.jsp

# Click the “OK” button.


DMDC
Information and Technology for Better Decision Making
DEERS Purchase Card Online System Single Sign-On

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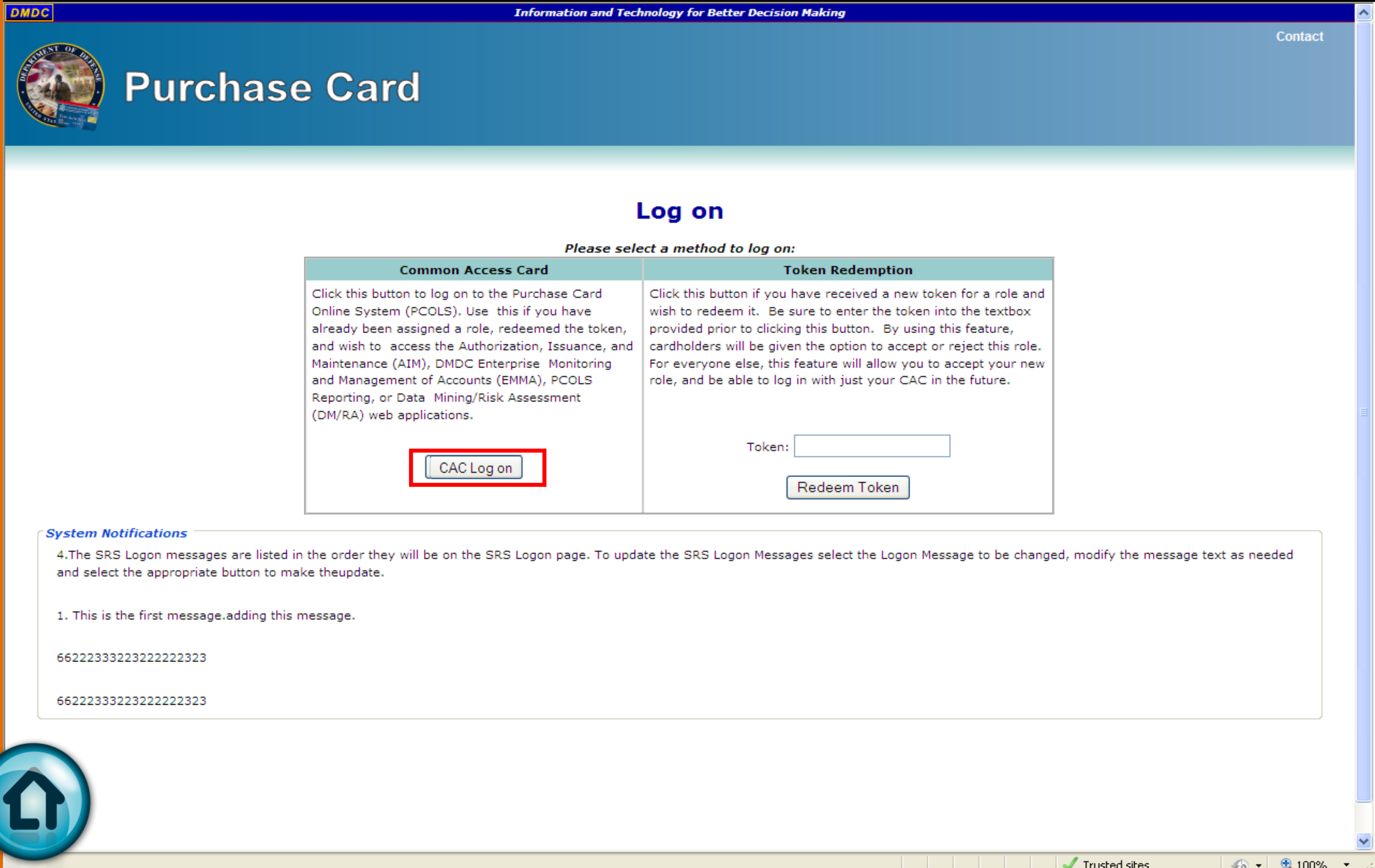
- At any time, the USG may inspect and seize data stored on this IS.
- Communications using, or data stored on, this IS are not private, are subject to routine monitoring, interception, and search, and may be disclosed or used for any USG authorized purpose.
- This IS includes security measures (e.g., authentication and access controls) to protect USG interests - not for your personal benefit or privacy.
- Notwithstanding the above, using this IS does not constitute consent to PM, LE or CI investigative searching or monitoring of the content of privileged communications, or work product, related to personal representation or services by attorneys, psychotherapists, or clergy, and their assistants. Such communications and work product are private and confidential. See User Agreement for details.

# Click the “CAC Log on” button



## Log on

*Please select a method to log on:*

| Common Access Card | Token Redemption |
|---|---|
| Click this button to log on to the Purchase Card Online System (PCOLS). Use this if you have already been assigned a role, redeemed the token, and wish to access the Authorization, Issuance, and Maintenance (AIM), DMDC Enterprise Monitoring and Management of Accounts (EMMA), PCOLS Reporting, or Data Mining/Risk Assessment (DM/RA) web applications. | Click this button if you have received a new token for a role and wish to redeem it. Be sure to enter the token into the textbox provided prior to clicking this button. By using this feature, cardholders will be given the option to accept or reject this role. For everyone else, this feature will allow you to accept your new role, and be able to log in with just your CAC in the future. |
| CAC Log on | Token:<br>Redeem Token |

***System Notifications***

4.The SRS Logon messages are listed in the order they will be on the SRS Logon page. To update the SRS Logon Messages select the Logon Message to be changed, modify the message text as needed and select the appropriate button to make theupdate.

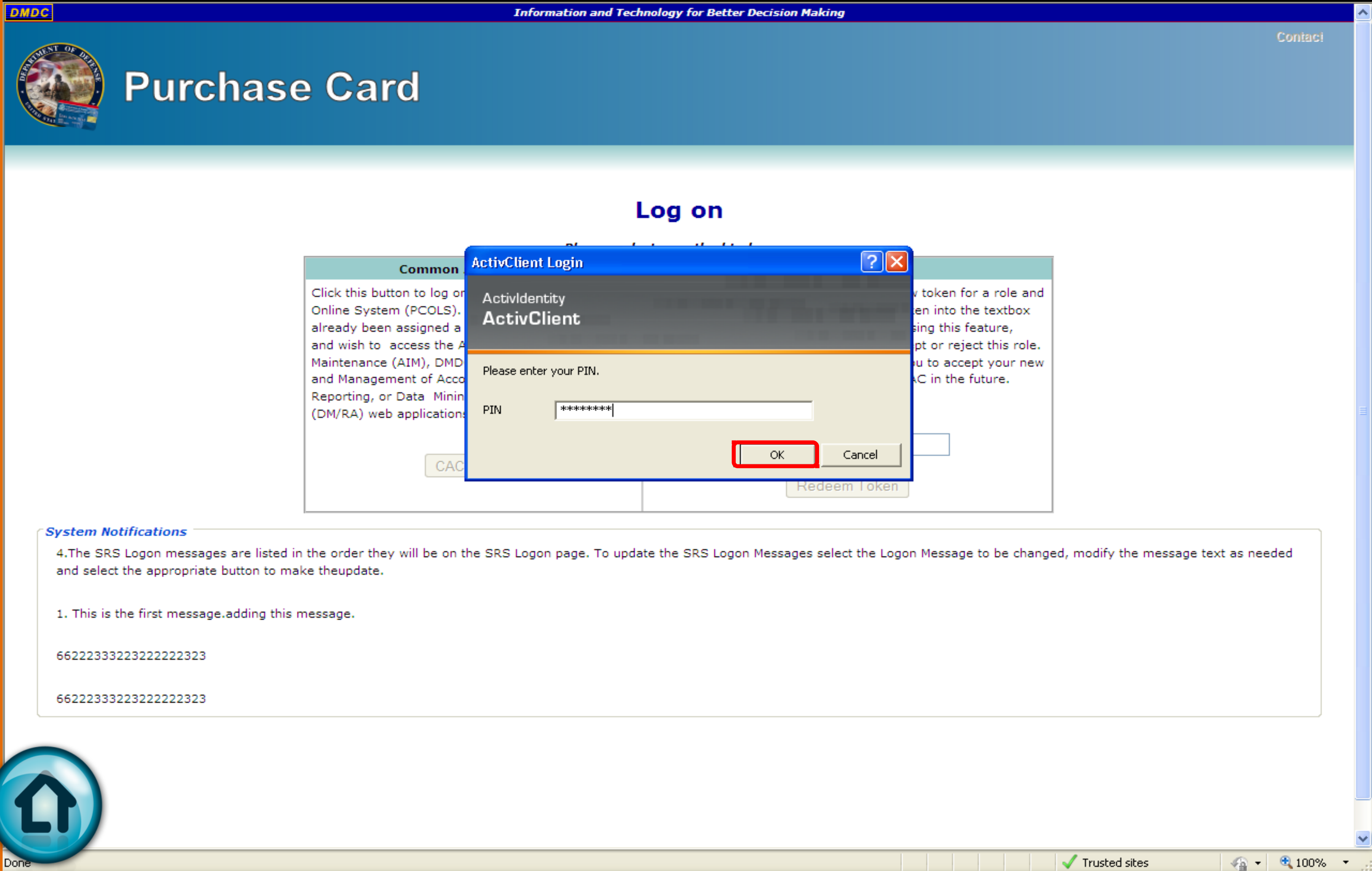
1. This is the first message.adding this message.

66222333223222222323

66222333223222222323

## A/OPC – Action 2 AIM: Verify CA Information is Correct

# The A/OPC has entered their PIN. Click the “OK” button.



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Information and Technology for Better Decision Making
Contact
Purchase Card

### Log on

**Common**

Click this button to log on Online System (PCOLS). already been assigned a and wish to access the A Maintenance (AIM), DMD and Management of Acco Reporting, or Data Minin (DM/RA) web application

CAC

token for a role and en into the textbox sing this feature, pt or reject this role. u to accept your new C in the future.

Redeem Token

ActivClient Login
ActivIdentity
ActivClient

Please enter your PIN.

PIN *********

OK
Cancel

*System Notifications*

4.The SRS Logon messages are listed in the order they will be on the SRS Logon page. To update the SRS Logon Messages select the Logon Message to be changed, modify the message text as needed and select the appropriate button to make theupdate.

1. This is the first message.adding this message.

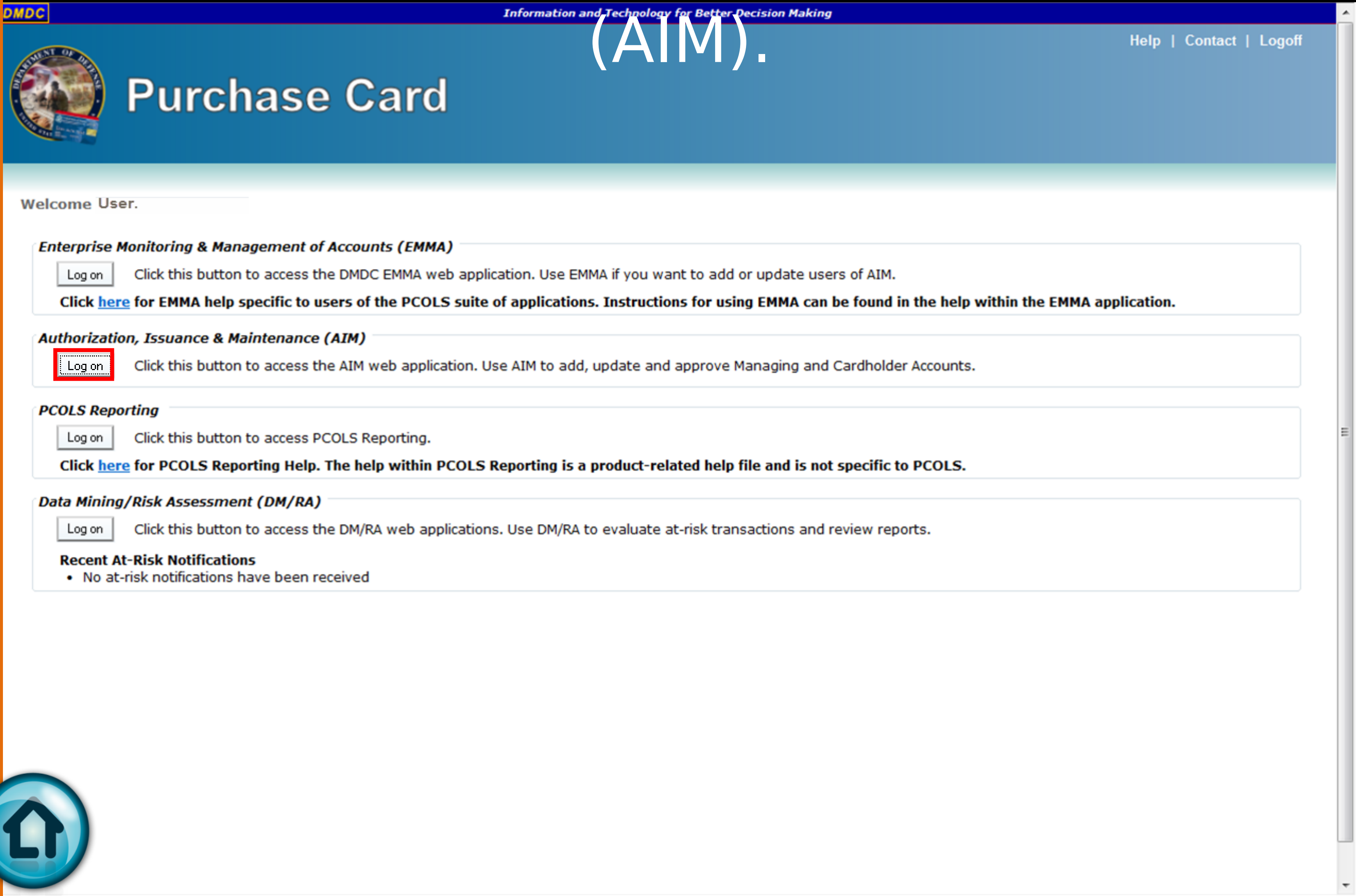
6622233322322222222323

6622233322322222222323

Done
Trusted sites
100%

A/OPC Action 2 AIM: Verify CA Information is Correct

# Click on the “Log on” button for Authorization, Issuance & Maintenance (AIM).



Welcome User.

**Enterprise Monitoring & Management of Accounts (EMMA)**

Log on — Click this button to access the DMDC EMMA web application. Use EMMA if you want to add or update users of AIM.

**Click here for EMMA help specific to users of the PCOLS suite of applications. Instructions for using EMMA can be found in the help within the EMMA application.**

**Authorization, Issuance & Maintenance (AIM)**

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Log on — Click this button to access PCOLS Reporting.

**Click here for PCOLS Reporting Help. The help within PCOLS Reporting is a product-related help file and is not specific to PCOLS.**

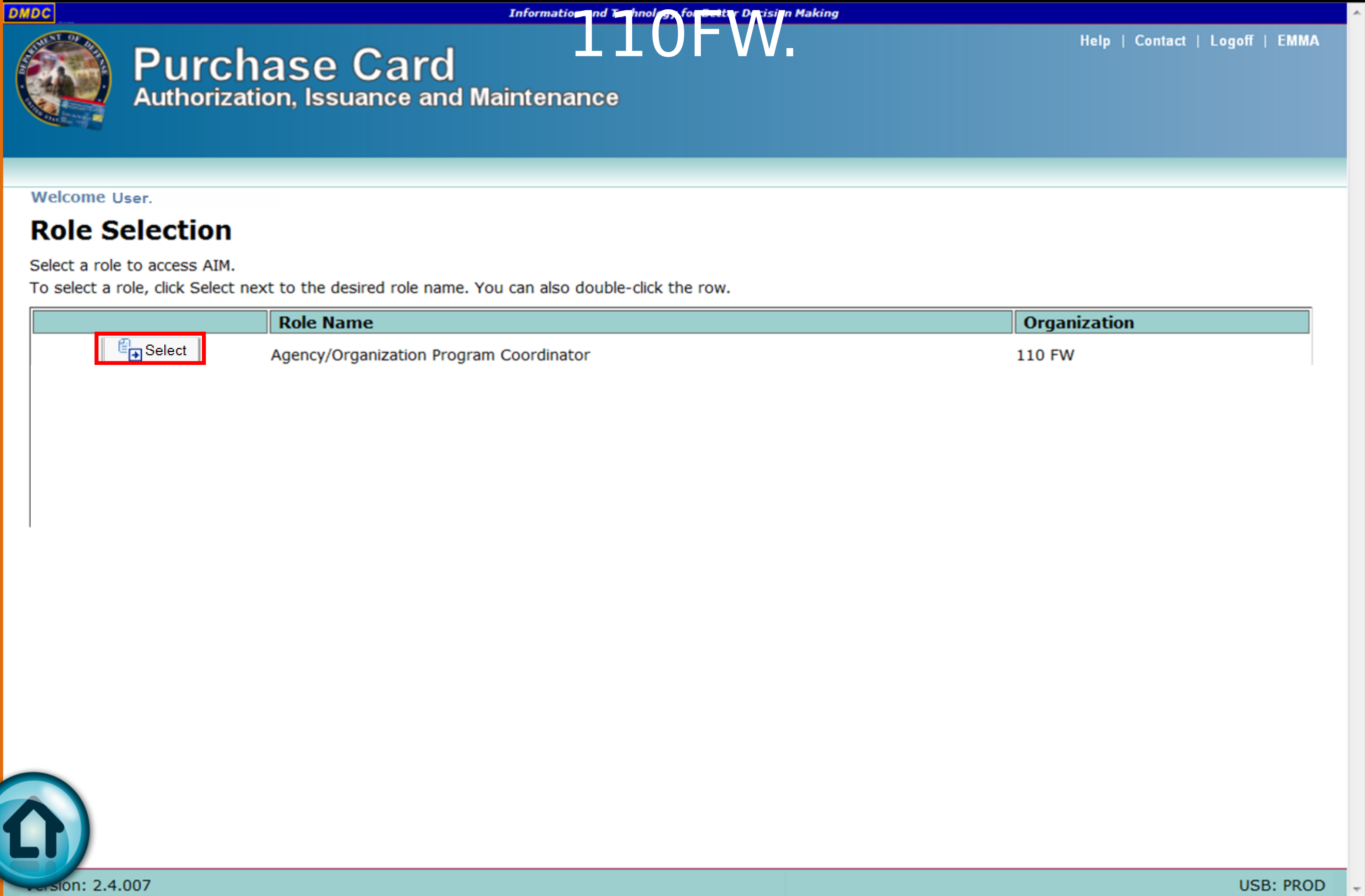
**Data Mining/Risk Assessment (DM/RA)**

Log on — Click this button to access the DM/RA web applications. Use DM/RA to evaluate at-risk transactions and review reports.

**Recent At-Risk Notifications**
- No at-risk notifications have been received

## A/OPC Action 2 AIM: Verify CA Information is Correct

# Click the “Select” button for the Agency/Program Coordinator role for 110FW.


DMDC
Information and Technology for Better Decision Making
Purchase Card
Authorization, Issuance and Maintenance
Help | Contact | Logoff | EMMA

Welcome User.

### Role Selection

Select a role to access AIM.
To select a role, click Select next to the desired role name. You can also double-click the row.

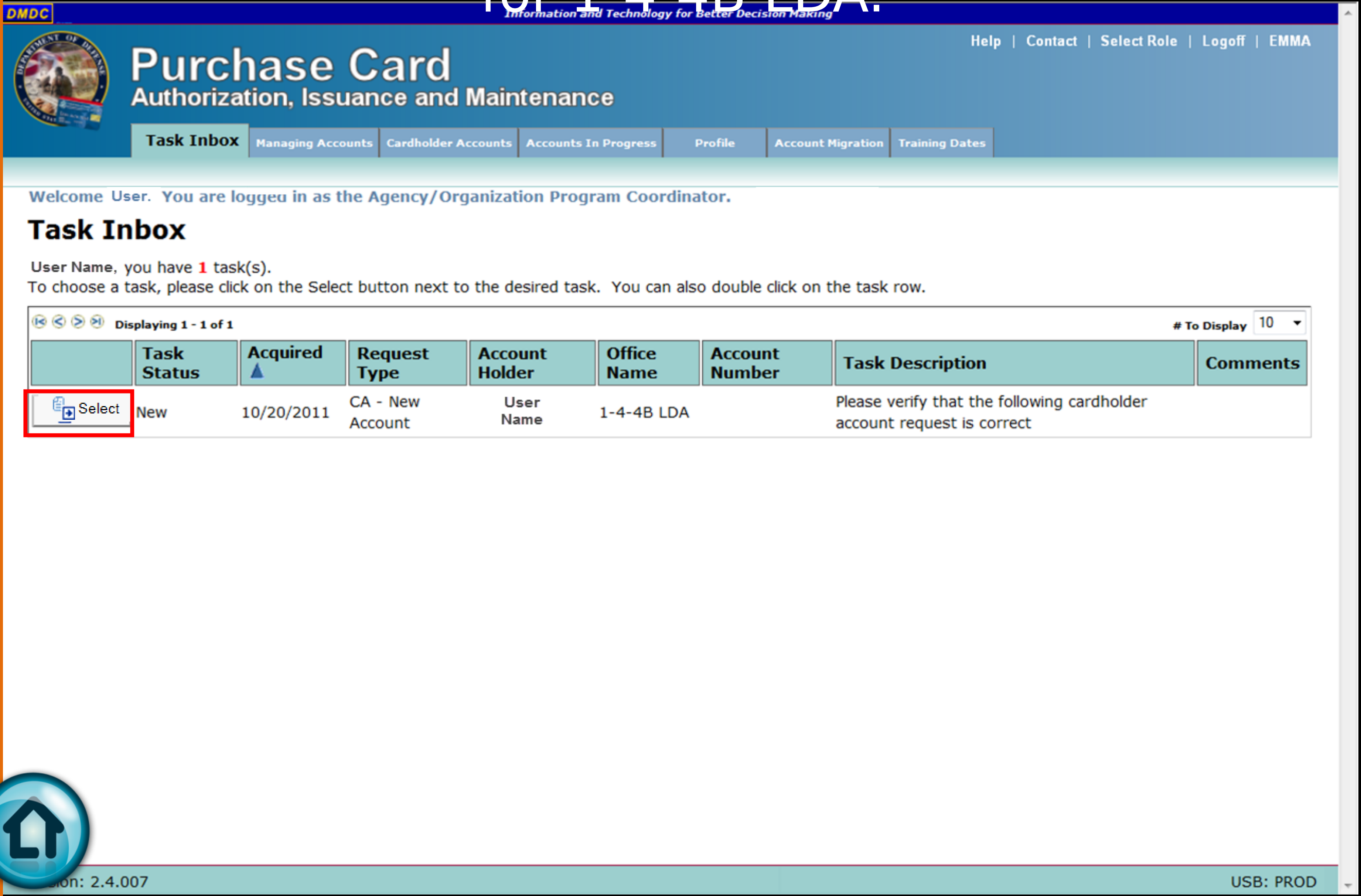
| | Role Name | Organization |
|---|---|---|
| Select | Agency/Organization Program Coordinator | 110 FW |

Version: 2.4.007

USB: PROD

# The A/OPC has been directed to their Task Inbox. Click on the "Select" button to view the new task for 1-4-4B LDA.

**A/OPC Action 2 AIM: Verify CA Information is Correct**



DMDC
Information and Technology for Better Decision Making
Help | Contact | Select Role | Logoff | EMMA
Purchase Card
Authorization, Issuance and Maintenance
Task Inbox
Managing Accounts
Cardholder Accounts
Accounts In Progress
Profile
Account Migration
Training Dates

Welcome User. You are logged in as the Agency/Organization Program Coordinator.

Task Inbox

User Name, you have 1 task(s).
To choose a task, please click on the Select button next to the desired task. You can also double click on the task row.

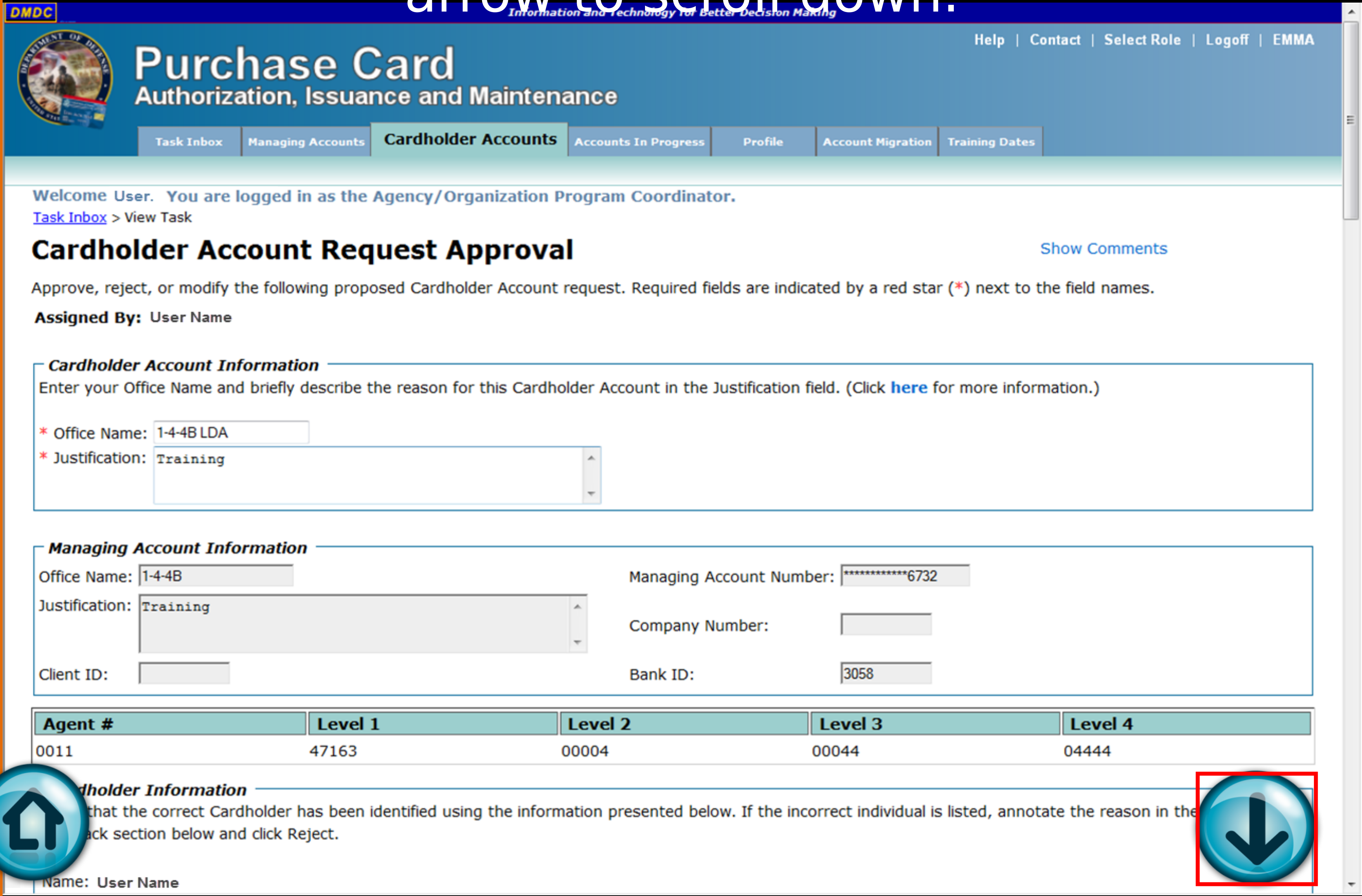
Displaying 1 - 1 of 1 # To Display 10

| | Task Status | Acquired | Request Type | Account Holder | Office Name | Account Number | Task Description | Comments |
|---|---|---|---|---|---|---|---|---|
| Select | New | 10/20/2011 | CA - New Account | User Name | 1-4-4B LDA | | Please verify that the following cardholder account request is correct | |

Version: 2.4.007 USB: PROD

## A/OPC Action 2 AIM: Verify CA Information is Correct

The A/OPC verifies that all cardholder account information is correct and complete. Click on the arrow to scroll down.


DMDC
Information and Technology for Better Decision Making
Help | Contact | Select Role | Logoff | EMMA
Purchase Card
Authorization, Issuance and Maintenance
Task Inbox
Managing Accounts
Cardholder Accounts
Accounts In Progress
Profile
Account Migration
Training Dates

Welcome User. You are logged in as the Agency/Organization Program Coordinator.

Task Inbox > View Task

### Cardholder Account Request Approval

Show Comments

Approve, reject, or modify the following proposed Cardholder Account request. Required fields are indicated by a red star (*) next to the field names.

**Assigned By:** User Name

***Cardholder Account Information***

Enter your Office Name and briefly describe the reason for this Cardholder Account in the Justification field. (Click here for more information.)

* Office Name: 1-4-4B LDA

* Justification: Training

***Managing Account Information***

Office Name: 1-4-4B

Justification: Training

Client ID:

Managing Account Number: ************6732

Company Number:

Bank ID: 3058

| Agent # | Level 1 | Level 2 | Level 3 | Level 4 |
|---|---|---|---|---|
| 0011 | 47163 | 00004 | 00044 | 04444 |

***dholder Information***

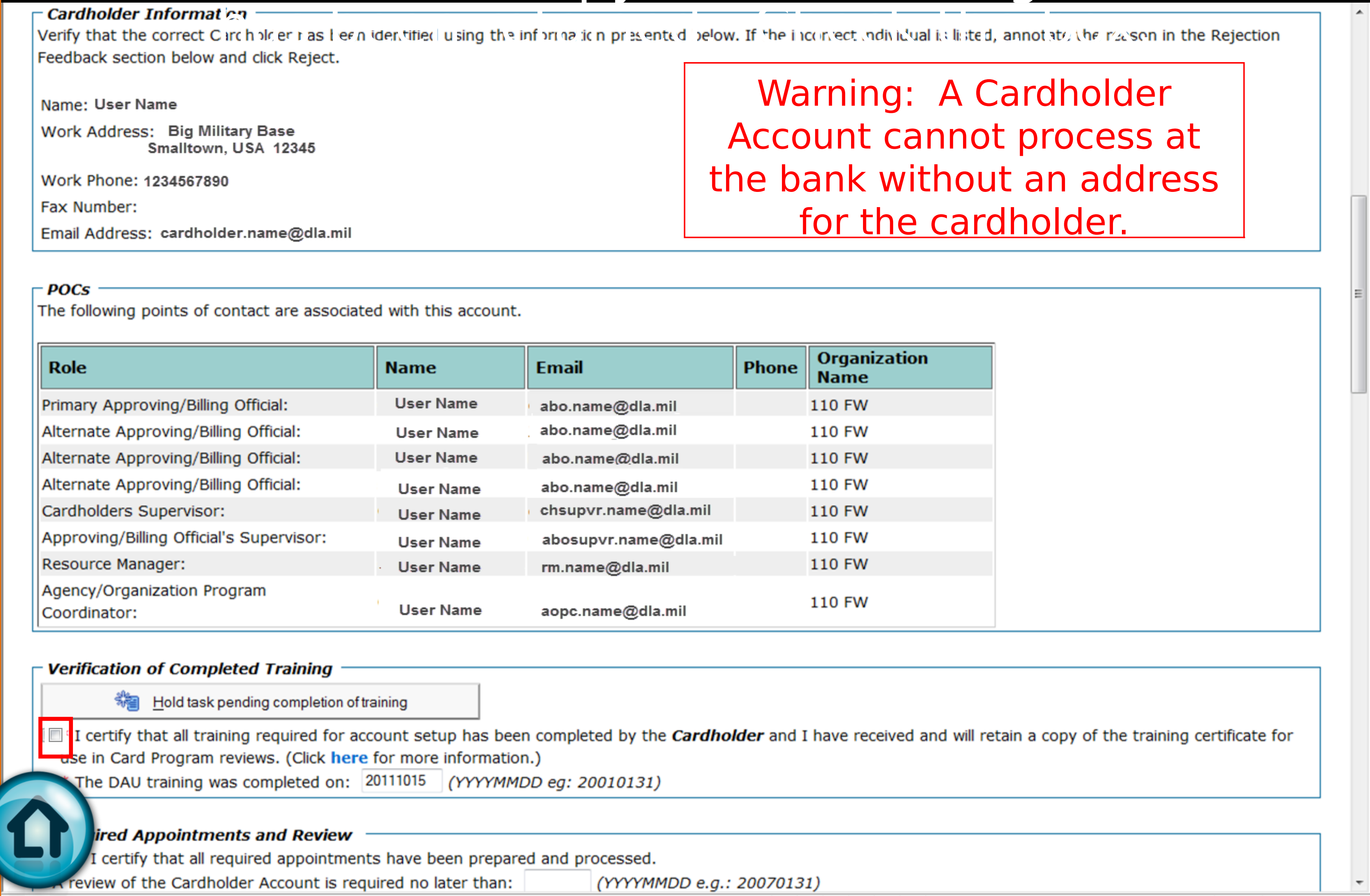
that the correct Cardholder has been identified using the information presented below. If the incorrect individual is listed, annotate the reason in the

ck section below and click Reject.

Name: User Name

# The A/OPC verifies that all training required for account setup has been completed by the cardholder and a copy of the training certificate

## A/OPC Action 2 AIM: Verify CA Information is Correct



***Cardholder Information***

Verify that the correct Cardholder has been identified using the information presented below. If the incorrect individual is listed, annotate the reason in the Rejection Feedback section below and click Reject.

Name: **User Name**

Work Address: **Big Military Base**
**Smalltown, USA 12345**

Work Phone: **1234567890**

Fax Number:

Email Address: **cardholder.name@dla.mil**

Warning: A Cardholder Account cannot process at the bank without an address for the cardholder.

***POCs***

The following points of contact are associated with this account.

| Role | Name | Email | Phone | Organization Name |
|---|---|---|---|---|
| Primary Approving/Billing Official: | User Name | abo.name@dla.mil | | 110 FW |
| Alternate Approving/Billing Official: | User Name | abo.name@dla.mil | | 110 FW |
| Alternate Approving/Billing Official: | User Name | abo.name@dla.mil | | 110 FW |
| Alternate Approving/Billing Official: | User Name | abo.name@dla.mil | | 110 FW |
| Cardholders Supervisor: | User Name | chsupvr.name@dla.mil | | 110 FW |
| Approving/Billing Official's Supervisor: | User Name | abosupvr.name@dla.mil | | 110 FW |
| Resource Manager: | User Name | rm.name@dla.mil | | 110 FW |
| Agency/Organization Program Coordinator: | User Name | aopc.name@dla.mil | | 110 FW |

***Verification of Completed Training***

☐ I certify that all training required for account setup has been completed by the ***Cardholder*** and I have received and will retain a copy of the training certificate for use in Card Program reviews. (Click here for more information.)

* The DAU training was completed on: 20111015 *(YYYYMMDD eg: 20010131)*

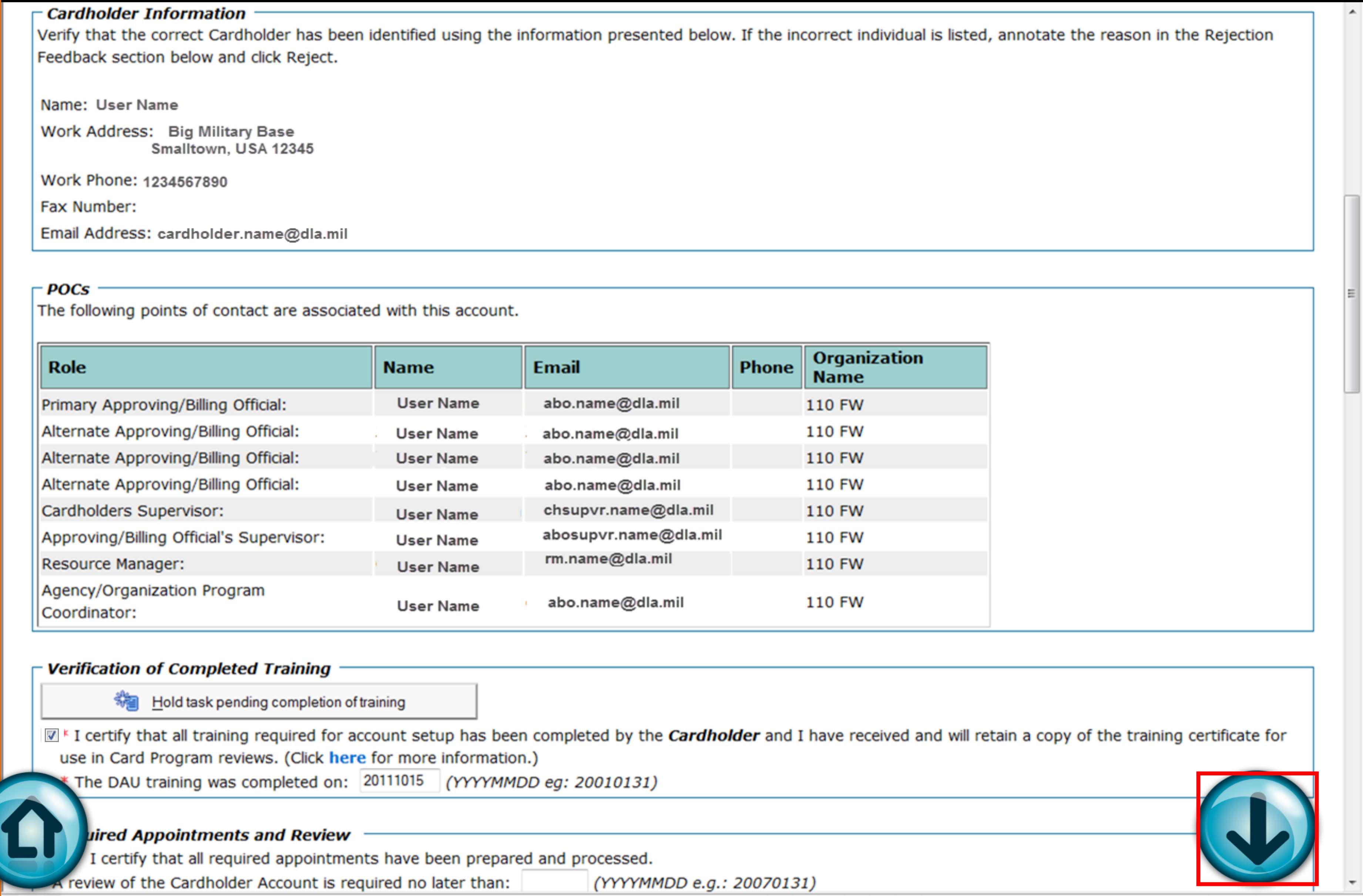
***ired Appointments and Review***

I certify that all required appointments have been prepared and processed.

A review of the Cardholder Account is required no later than: *(YYYYMMDD e.g.: 20070131)*

## A/OPC Action 2 AIM: Verify CA Information is Correct

# Click the arrow to scroll down.



***Cardholder Information***

Verify that the correct Cardholder has been identified using the information presented below. If the incorrect individual is listed, annotate the reason in the Rejection Feedback section below and click Reject.

Name: User Name

Work Address: Big Military Base
Smalltown, USA 12345

Work Phone: 1234567890

Fax Number:

Email Address: cardholder.name@dla.mil

***POCs***

The following points of contact are associated with this account.

| Role | Name | Email | Phone | Organization Name |
|---|---|---|---|---|
| Primary Approving/Billing Official: | User Name | abo.name@dla.mil | | 110 FW |
| Alternate Approving/Billing Official: | User Name | abo.name@dla.mil | | 110 FW |
| Alternate Approving/Billing Official: | User Name | abo.name@dla.mil | | 110 FW |
| Alternate Approving/Billing Official: | User Name | abo.name@dla.mil | | 110 FW |
| Cardholders Supervisor: | User Name | chsupvr.name@dla.mil | | 110 FW |
| Approving/Billing Official's Supervisor: | User Name | abosupvr.name@dla.mil | | 110 FW |
| Resource Manager: | User Name | rm.name@dla.mil | | 110 FW |
| Agency/Organization Program Coordinator: | User Name | abo.name@dla.mil | | 110 FW |

***Verification of Completed Training***

☑ * I certify that all training required for account setup has been completed by the ***Cardholder*** and I have received and will retain a copy of the training certificate for use in Card Program reviews. (Click here for more information.)

* The DAU training was completed on: 20111015 *(YYYYMMDD eg: 20010131)*

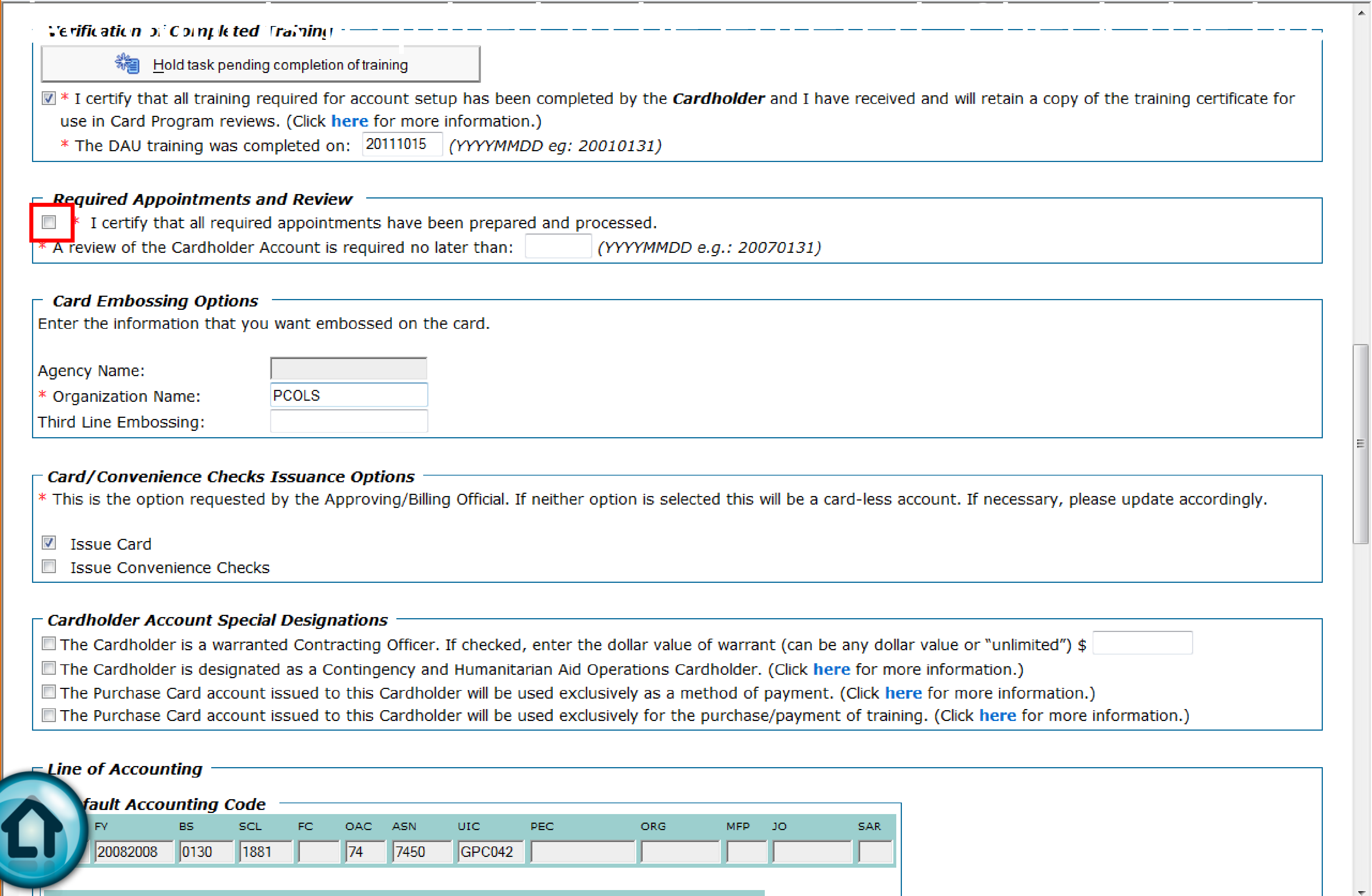
***uired Appointments and Review***

I certify that all required appointments have been prepared and processed.

A review of the Cardholder Account is required no later than: *(YYYYMMDD e.g.: 20070131)*

A/OPC Action 2 AIM: Verify CA Information is Correct

# The A/OPC certifies that all required appointments have been prepared and processed. A date for a review of the Cardholder



*Verification of Completed Training*

☑ * I certify that all training required for account setup has been completed by the **Cardholder** and I have received and will retain a copy of the training certificate for use in Card Program reviews. (Click **here** for more information.)

* The DAU training was completed on: 20111015 *(YYYYMMDD eg: 20010131)*

***Required Appointments and Review***

☐ * I certify that all required appointments have been prepared and processed.

* A review of the Cardholder Account is required no later than: *(YYYYMMDD e.g.: 20070131)*

***Card Embossing Options***

Enter the information that you want embossed on the card.

Agency Name:

* Organization Name: PCOLS

Third Line Embossing:

***Card/Convenience Checks Issuance Options***

* This is the option requested by the Approving/Billing Official. If neither option is selected this will be a card-less account. If necessary, please update accordingly.

☑ Issue Card

☐ Issue Convenience Checks

***Cardholder Account Special Designations***

☐ The Cardholder is a warranted Contracting Officer. If checked, enter the dollar value of warrant (can be any dollar value or "unlimited") $

☐ The Cardholder is designated as a Contingency and Humanitarian Aid Operations Cardholder. (Click **here** for more information.)

☐ The Purchase Card account issued to this Cardholder will be used exclusively as a method of payment. (Click **here** for more information.)

☐ The Purchase Card account issued to this Cardholder will be used exclusively for the purchase/payment of training. (Click **here** for more information.)

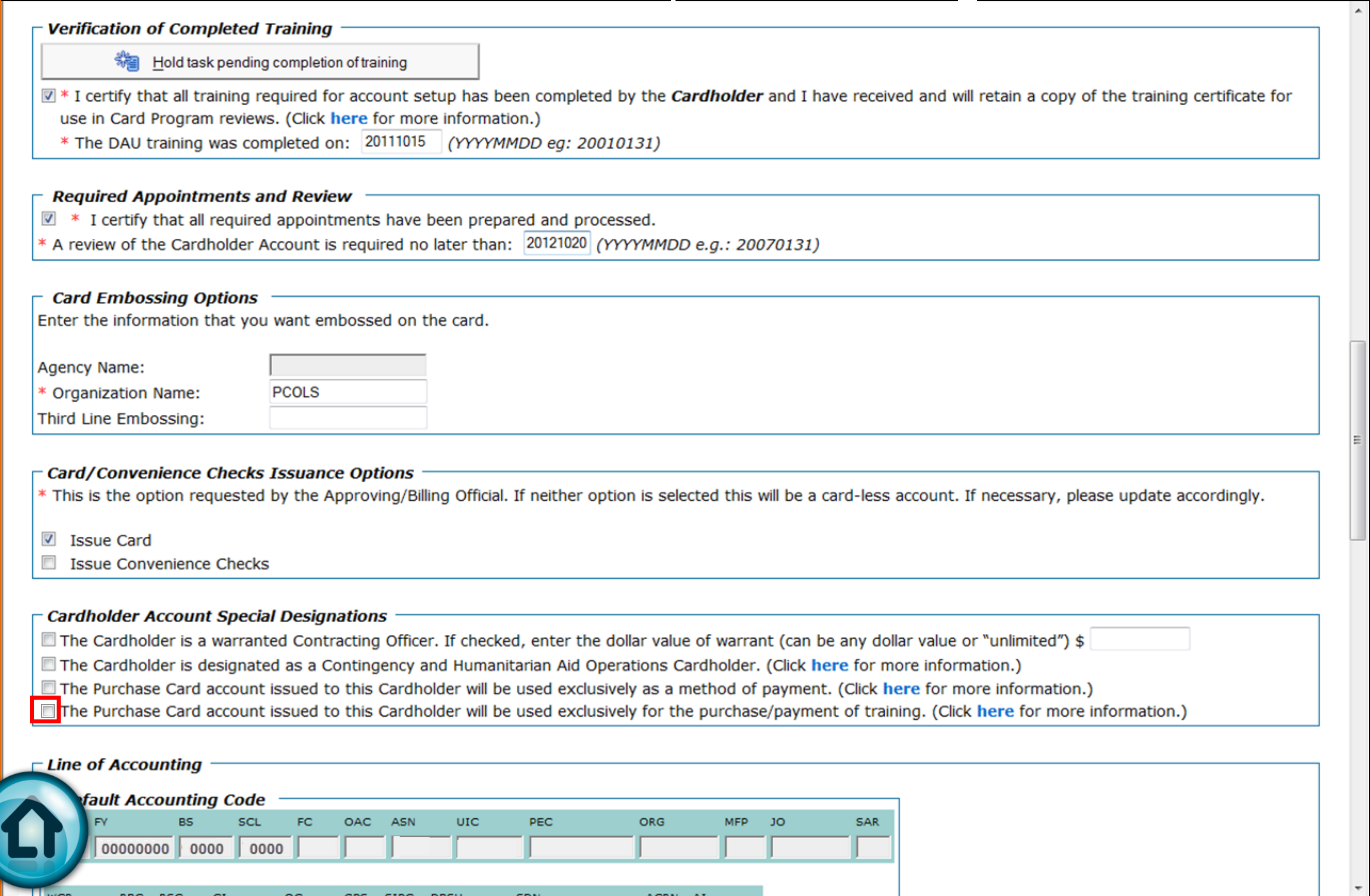
***Line of Accounting***

***fault Accounting Code***

| FY | BS | SCL | FC | OAC | ASN | UIC | PEC | ORG | MFP | JO | SAR |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 20082008 | 0130 | 1881 |  | 74 | 7450 | GPC042 |  |  |  |  |  |

# A/OPC Action 2 AIM: Verify CA Information is Correct

## The A/OPC has the option to assign special designations to the Cardholder Account. Check the box to add a special designation.



**Verification of Completed Training**

☑ * I certify that all training required for account setup has been completed by the ***Cardholder*** and I have received and will retain a copy of the training certificate for use in Card Program reviews. (Click **here** for more information.)

* The DAU training was completed on: 20111015 *(YYYYMMDD eg: 20010131)*

**Required Appointments and Review**

☑ * I certify that all required appointments have been prepared and processed.

* A review of the Cardholder Account is required no later than: 20121020 *(YYYYMMDD e.g.: 20070131)*

**Card Embossing Options**

Enter the information that you want embossed on the card.

Agency Name:
* Organization Name: PCOLS
Third Line Embossing:

**Card/Convenience Checks Issuance Options**

* This is the option requested by the Approving/Billing Official. If neither option is selected this will be a card-less account. If necessary, please update accordingly.

☑ Issue Card
☐ Issue Convenience Checks

**Cardholder Account Special Designations**

☐ The Cardholder is a warranted Contracting Officer. If checked, enter the dollar value of warrant (can be any dollar value or "unlimited") $
☐ The Cardholder is designated as a Contingency and Humanitarian Aid Operations Cardholder. (Click **here** for more information.)
☐ The Purchase Card account issued to this Cardholder will be used exclusively as a method of payment. (Click **here** for more information.)
☐ The Purchase Card account issued to this Cardholder will be used exclusively for the purchase/payment of training. (Click **here** for more information.)

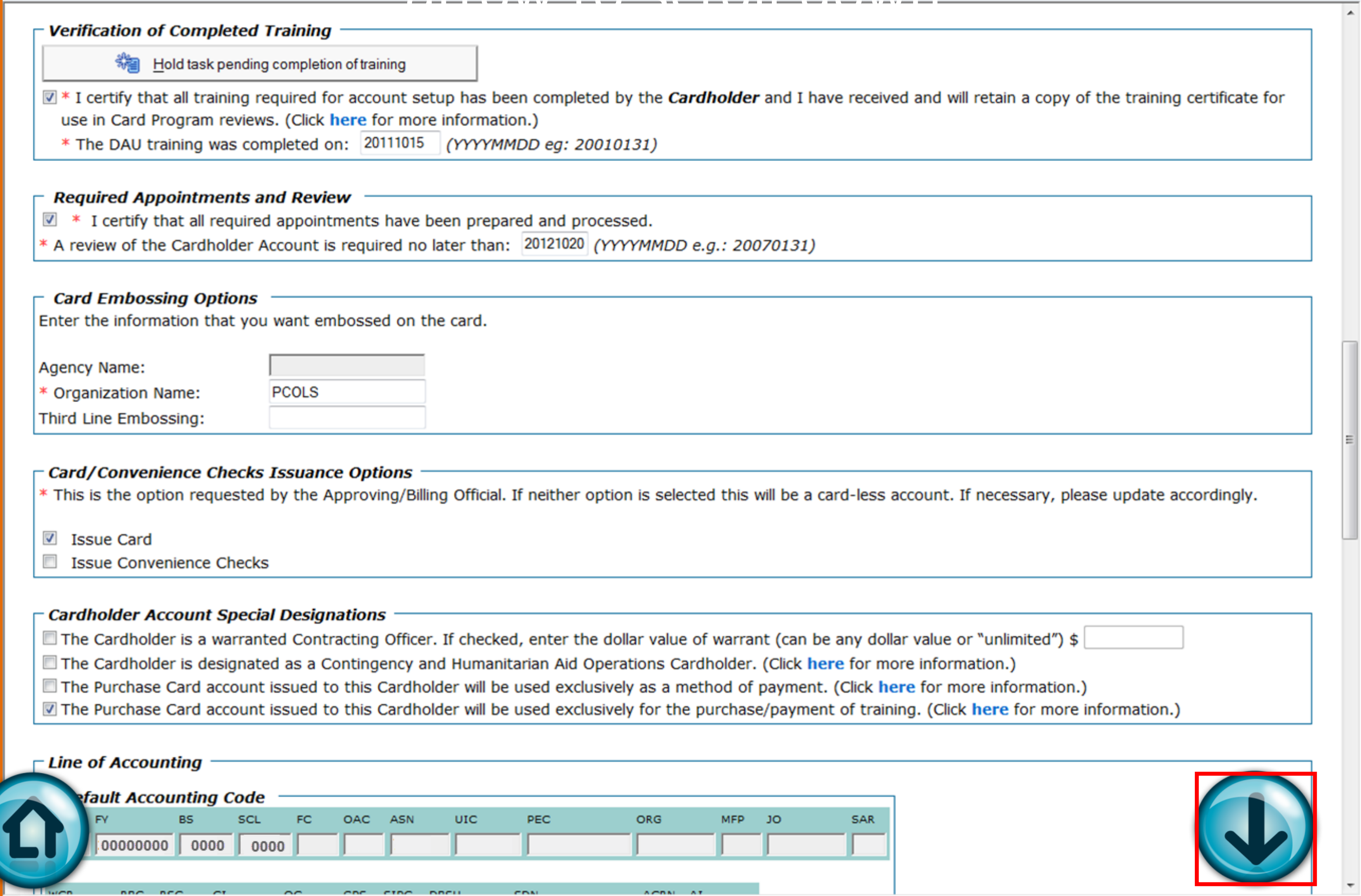
**Line of Accounting**

**fault Accounting Code**

| FY | BS | SCL | FC | OAC | ASN | UIC | PEC | ORG | MFP | JO | SAR |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 00000000 | 0000 | 0000 | | | | | | | | | |

A/OPC Action 2 AIM: Verify CA Information is Correct

# The A/OPC verifies that all cardholder account information is correct and complete. Click on the arrow to scroll down



***Verification of Completed Training***

Hold task pending completion of training

☑ * I certify that all training required for account setup has been completed by the ***Cardholder*** and I have received and will retain a copy of the training certificate for use in Card Program reviews. (Click **here** for more information.)

* The DAU training was completed on: 20111015 *(YYYYMMDD eg: 20010131)*

***Required Appointments and Review***

☑ * I certify that all required appointments have been prepared and processed.

* A review of the Cardholder Account is required no later than: 20121020 *(YYYYMMDD e.g.: 20070131)*

***Card Embossing Options***

Enter the information that you want embossed on the card.

Agency Name:
* Organization Name: PCOLS
Third Line Embossing:

***Card/Convenience Checks Issuance Options***

* This is the option requested by the Approving/Billing Official. If neither option is selected this will be a card-less account. If necessary, please update accordingly.

☑ Issue Card
☐ Issue Convenience Checks

***Cardholder Account Special Designations***

☐ The Cardholder is a warranted Contracting Officer. If checked, enter the dollar value of warrant (can be any dollar value or "unlimited") $
☐ The Cardholder is designated as a Contingency and Humanitarian Aid Operations Cardholder. (Click **here** for more information.)
☐ The Purchase Card account issued to this Cardholder will be used exclusively as a method of payment. (Click **here** for more information.)
☑ The Purchase Card account issued to this Cardholder will be used exclusively for the purchase/payment of training. (Click **here** for more information.)

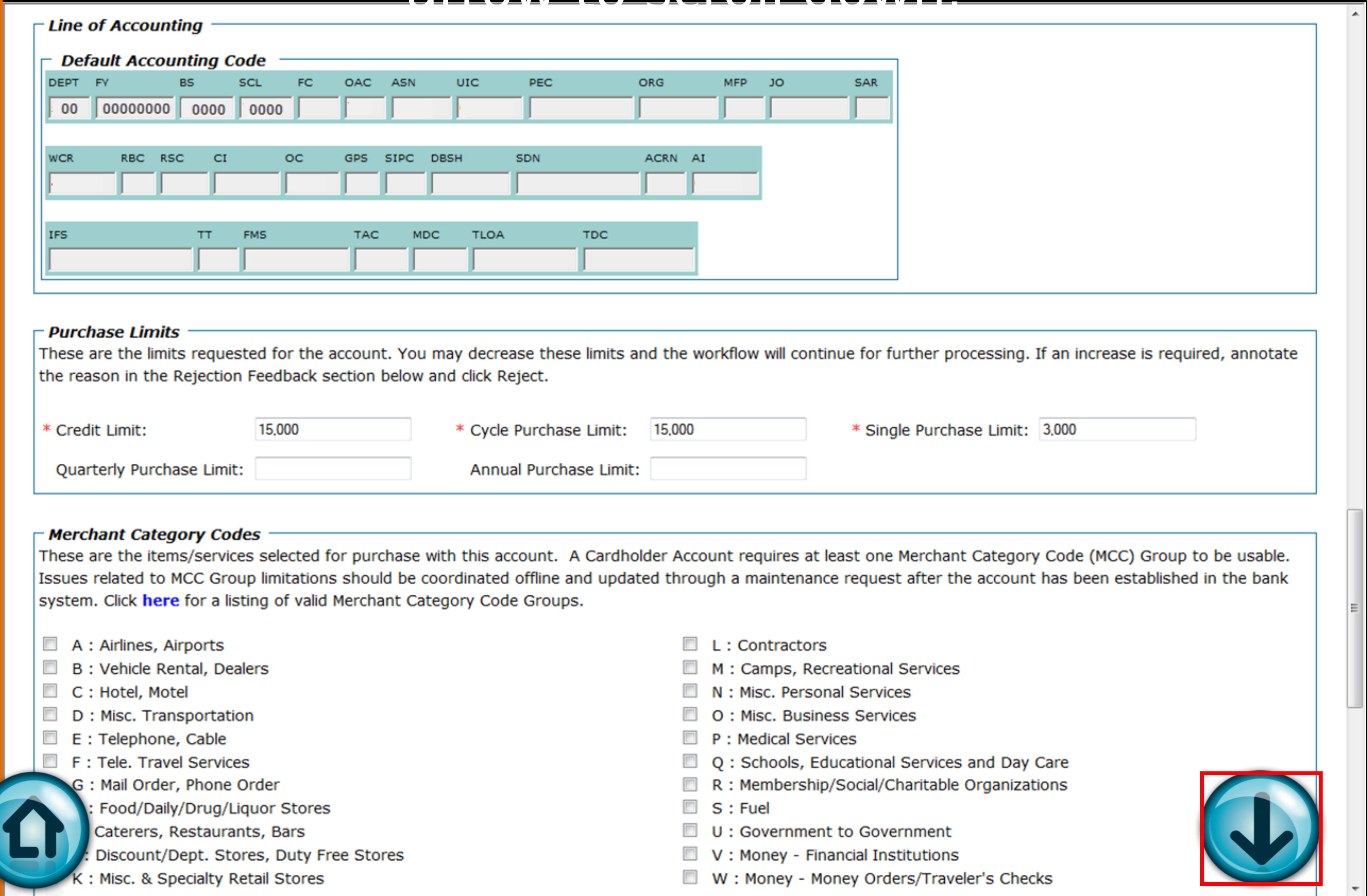
***Line of Accounting***

***fault Accounting Code***

| FY | BS | SCL | FC | OAC | ASN | UIC | PEC | ORG | MFP | JO | SAR |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 00000000 | 0000 | 0000 | | | | | | | | | |

## A/OPC Action 2 AIM: Verify CA Information is Correct

# The A/OPC verifies that all cardholder account information is correct and complete. Click on the arrow to scroll down.



**Line of Accounting**

**Default Accounting Code**

| DEPT | FY | BS | SCL | FC | OAC | ASN | UIC | PEC | ORG | MFP | JO | SAR |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 00 | 00000000 | 0000 | 0000 | | | | | | | | | |

| WCR | RBC | RSC | CI | OC | GPS | SIPC | DBSH | SDN | ACRN | AI |
|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | | | |

| IFS | TT | FMS | TAC | MDC | TLOA | TDC |
|---|---|---|---|---|---|---|
| | | | | | | |

**Purchase Limits**

These are the limits requested for the account. You may decrease these limits and the workflow will continue for further processing. If an increase is required, annotate the reason in the Rejection Feedback section below and click Reject.

* Credit Limit: 15,000
* Cycle Purchase Limit: 15,000
* Single Purchase Limit: 3,000
Quarterly Purchase Limit:
Annual Purchase Limit:

**Merchant Category Codes**

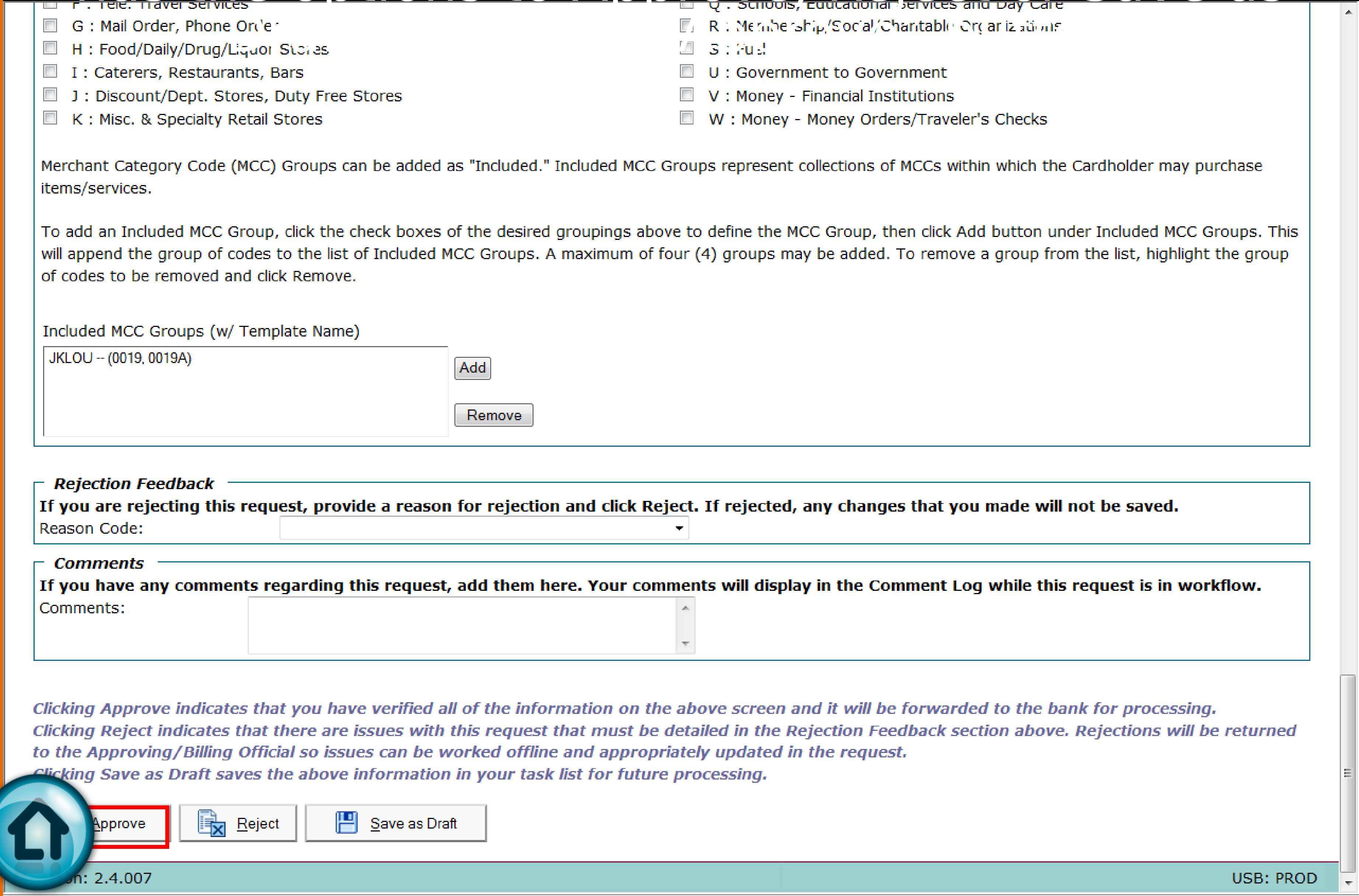
These are the items/services selected for purchase with this account. A Cardholder Account requires at least one Merchant Category Code (MCC) Group to be usable. Issues related to MCC Group limitations should be coordinated offline and updated through a maintenance request after the account has been established in the bank system. Click here for a listing of valid Merchant Category Code Groups.

☐ A : Airlines, Airports
☐ B : Vehicle Rental, Dealers
☐ C : Hotel, Motel
☐ D : Misc. Transportation
☐ E : Telephone, Cable
☐ F : Tele. Travel Services
G : Mail Order, Phone Order
: Food/Daily/Drug/Liquor Stores
Caterers, Restaurants, Bars
: Discount/Dept. Stores, Duty Free Stores
K : Misc. & Specialty Retail Stores

☐ L : Contractors
☐ M : Camps, Recreational Services
☐ N : Misc. Personal Services
☐ O : Misc. Business Services
☐ P : Medical Services
☐ Q : Schools, Educational Services and Day Care
☐ R : Membership/Social/Charitable Organizations
☐ S : Fuel
☐ U : Government to Government
☐ V : Money - Financial Institutions
☐ W : Money - Money Orders/Traveler's Checks

## A/OPC Action 2 AIM: Verify CA Information is Correct

# The A/OPC verifies that all cardholder account information is correct and complete. The A/OPC has the options to Approve, Reject or Save as



☐ F : Tele. Travel Services
☐ G : Mail Order, Phone Order
☐ H : Food/Daily/Drug/Liquor Stores
☐ I : Caterers, Restaurants, Bars
☐ J : Discount/Dept. Stores, Duty Free Stores
☐ K : Misc. & Specialty Retail Stores

☐ Q : Schools, Educational Services and Day Care
☐ R : Membership/Social/Charitable Organizations
☐ S : Fuel
☐ U : Government to Government
☐ V : Money - Financial Institutions
☐ W : Money - Money Orders/Traveler's Checks

Merchant Category Code (MCC) Groups can be added as "Included." Included MCC Groups represent collections of MCCs within which the Cardholder may purchase items/services.

To add an Included MCC Group, click the check boxes of the desired groupings above to define the MCC Group, then click Add button under Included MCC Groups. This will append the group of codes to the list of Included MCC Groups. A maximum of four (4) groups may be added. To remove a group from the list, highlight the group of codes to be removed and click Remove.

Included MCC Groups (w/ Template Name)

JKLOU -- (0019, 0019A)

***Rejection Feedback***

**If you are rejecting this request, provide a reason for rejection and click Reject. If rejected, any changes that you made will not be saved.**

Reason Code:

***Comments***

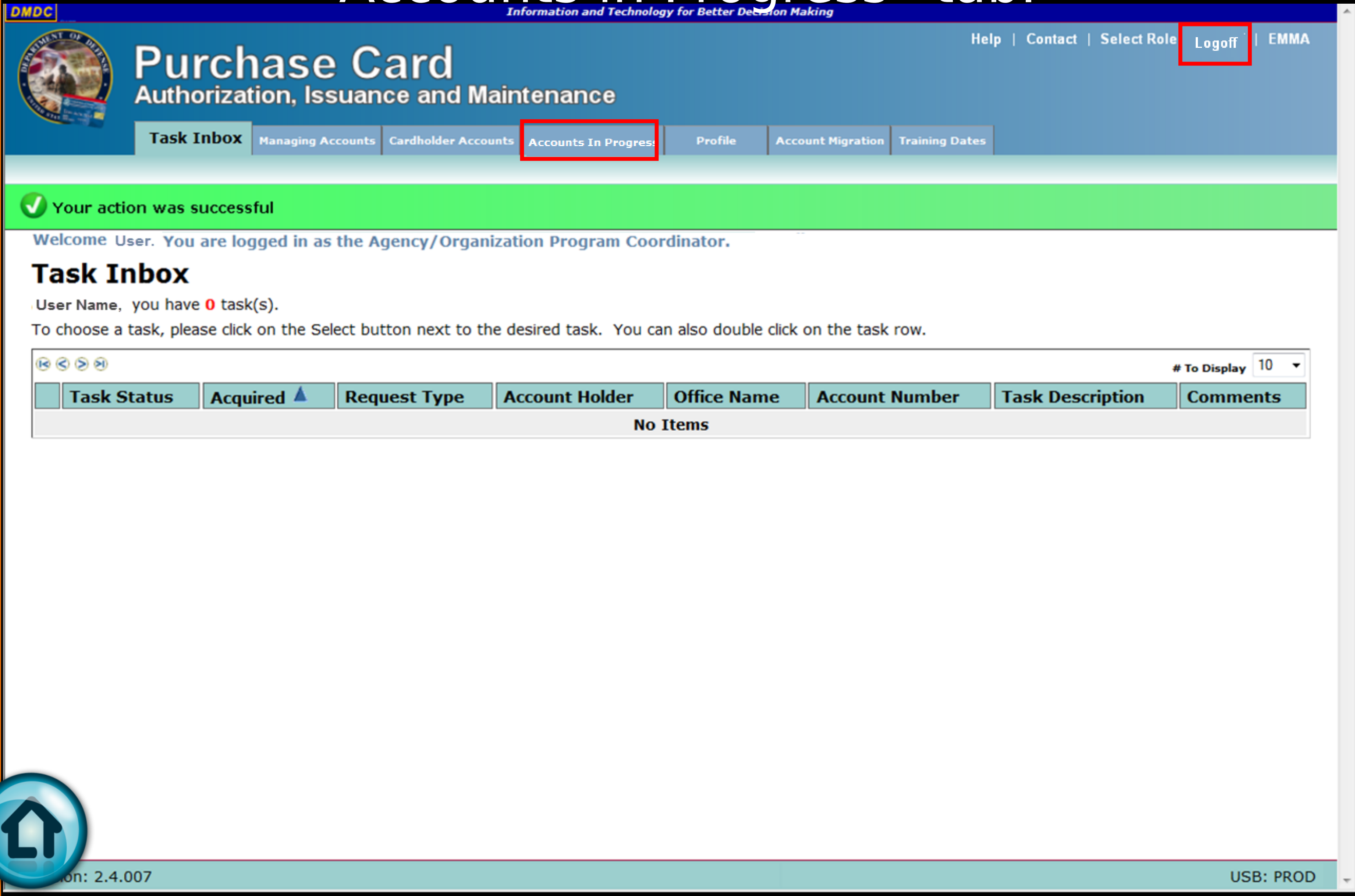
**If you have any comments regarding this request, add them here. Your comments will display in the Comment Log while this request is in workflow.**

Comments:

***Clicking Approve indicates that you have verified all of the information on the above screen and it will be forwarded to the bank for processing.***
***Clicking Reject indicates that there are issues with this request that must be detailed in the Rejection Feedback section above. Rejections will be returned to the Approving/Billing Official so issues can be worked offline and appropriately updated in the request.***
***Clicking Save as Draft saves the above information in your task list for future processing.***

# A/OPC Action 2 Aim: Verify CA Information is Correct

The action was successful. Click the "Logoff" link or to check the status of the account, click the "Accounts in Progress" tab.


DMDC
Information and Technology for Better Decision Making
Help | Contact | Select Role | Logoff | EMMA
Purchase Card
Authorization, Issuance and Maintenance
Task Inbox
Managing Accounts
Cardholder Accounts
Accounts In Progress
Profile
Account Migration
Training Dates

Your action was successful

Welcome User. You are logged in as the Agency/Organization Program Coordinator.

**Task Inbox**

User Name, you have 0 task(s).

To choose a task, please click on the Select button next to the desired task. You can also double click on the task row.

# To Display 10

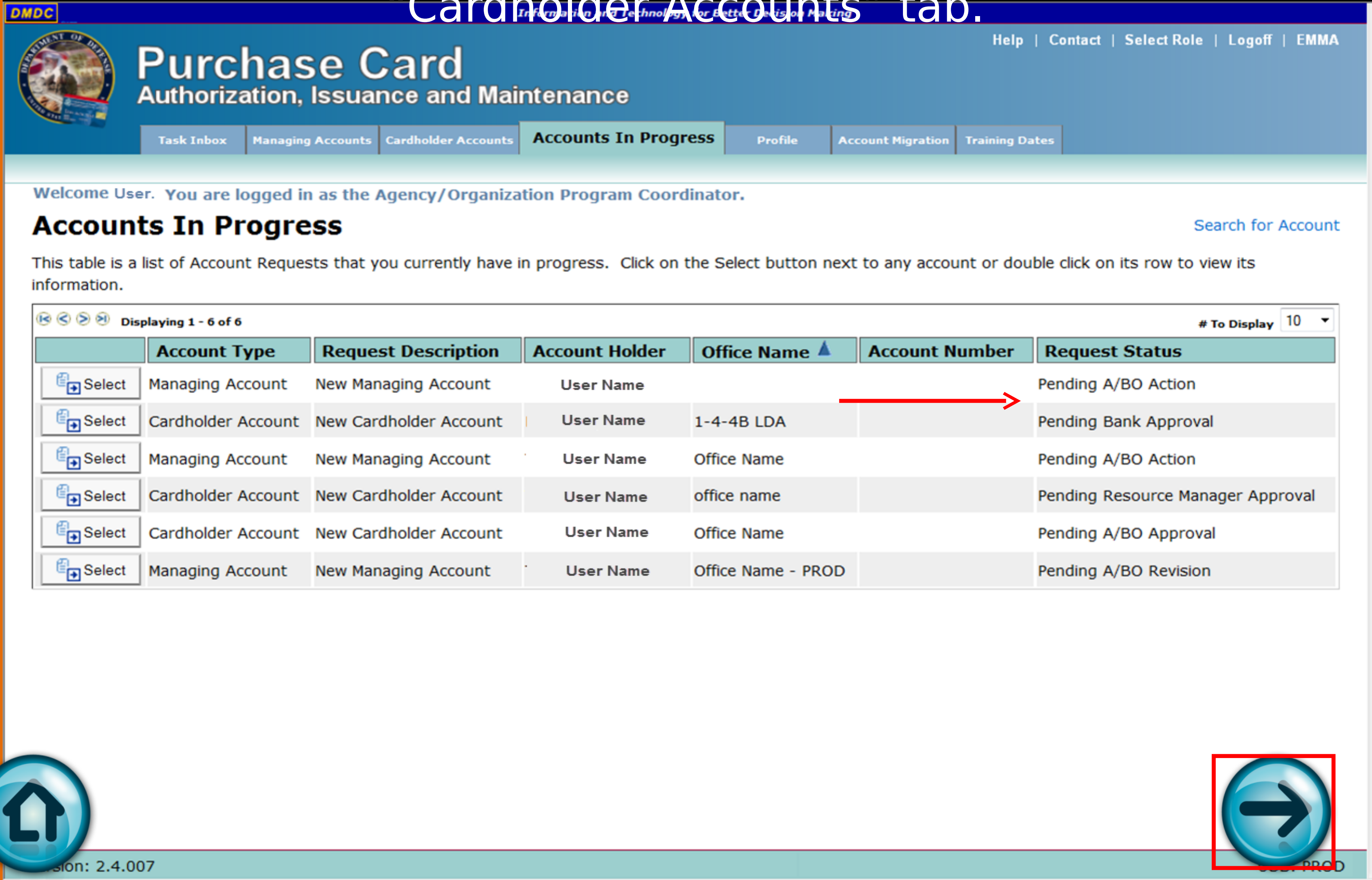
| | Task Status | Acquired | Request Type | Account Holder | Office Name | Account Number | Task Description | Comments |
|---|---|---|---|---|---|---|---|---|
| No Items | | | | | | | | |

on: 2.4.007

USB: PROD

# A/OPC Action 2 AIM: Verify CA Information is Correct

The Cardholder Account is currently in “Pending Bank Approval” status. Once the account has been processed at the bank (1 business day), this account will no longer be in the accounts in progress tab. It will show “Active” in the “Cardholder Accounts” tab.


DMDC
Information and Technology for Better Decision Making
Help | Contact | Select Role | Logoff | EMMA
Purchase Card
Authorization, Issuance and Maintenance
Task Inbox
Managing Accounts
Cardholder Accounts
Accounts In Progress
Profile
Account Migration
Training Dates
Search for Account
# To Display 10
sion: 2.4.007
PROD

Welcome User. You are logged in as the Agency/Organization Program Coordinator.

## Accounts In Progress

This table is a list of Account Requests that you currently have in progress. Click on the Select button next to any account or double click on its row to view its information.

Displaying 1 - 6 of 6

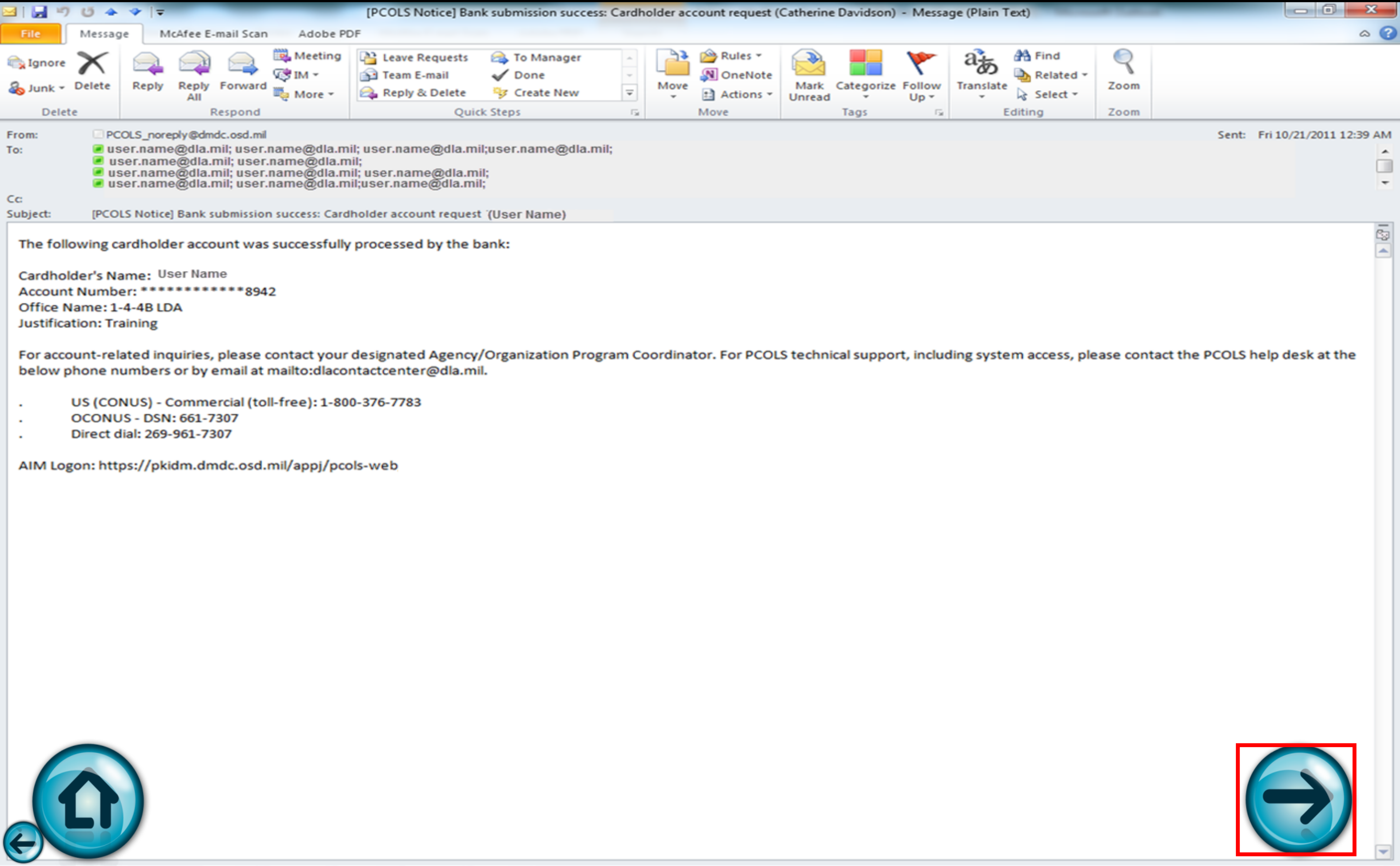
| | Account Type | Request Description | Account Holder | Office Name | Account Number | Request Status |
|---|---|---|---|---|---|---|
| Select | Managing Account | New Managing Account | User Name | | | Pending A/BO Action |
| Select | Cardholder Account | New Cardholder Account | User Name | 1-4-4B LDA | | Pending Bank Approval |
| Select | Managing Account | New Managing Account | User Name | Office Name | | Pending A/BO Action |
| Select | Cardholder Account | New Cardholder Account | User Name | office name | | Pending Resource Manager Approval |
| Select | Cardholder Account | New Cardholder Account | User Name | Office Name | | Pending A/BO Approval |
| Select | Managing Account | New Managing Account | User Name | Office Name - PROD | | Pending A/BO Revision |

A/OPC Action 2 AIM: Verify CA Information is Correct

# A/OPC Action 2

# Completed

# The Cardholder Account was successfully processed by the bank after 1 business day. All users associated with the cardholder account receive this email.


[PCOLS Notice] Bank submission success: Cardholder account request (Catherine Davidson) - Message (Plain Text)
File
Message
McAfee E-mail Scan
Adobe PDF
Ignore
Junk
Delete
Delete
Reply
Reply All
Forward
Meeting
IM
More
Respond
Leave Requests
Team E-mail
Reply & Delete
To Manager
Done
Create New
Quick Steps
Move
Rules
OneNote
Actions
Move
Mark Unread
Categorize
Follow Up
Tags
Translate
Find
Related
Select
Editing
Zoom
Zoom

From: PCOLS_noreply@dmdc.osd.mil

Sent: Fri 10/21/2011 12:39 AM

To: user.name@dla.mil; user.name@dla.mil; user.name@dla.mil;user.name@dla.mil; user.name@dla.mil; user.name@dla.mil; user.name@dla.mil; user.name@dla.mil; user.name@dla.mil; user.name@dla.mil; user.name@dla.mil;user.name@dla.mil;

Cc:

Subject: [PCOLS Notice] Bank submission success: Cardholder account request (User Name)

The following cardholder account was successfully processed by the bank:

Cardholder's Name: User Name
Account Number: ************8942
Office Name: 1-4-4B LDA
Justification: Training

For account-related inquiries, please contact your designated Agency/Organization Program Coordinator. For PCOLS technical support, including system access, please contact the PCOLS help desk at the below phone numbers or by email at mailto:dlacontactcenter@dla.mil.

- US (CONUS) - Commercial (toll-free): 1-800-376-7783
- OCONUS - DSN: 661-7307
- Direct dial: 269-961-7307

AIM Logon: https://pkidm.dmdc.osd.mil/appj/pcols-web

This concludes the PCOLS 101 Interactive Tutorial:

# **How to Create a New Cardholder Account in AIM**

PCOLS

101

INTERACTIVE TUTORIAL

To learn how to create a new managing account, view the PCOLS 101 Interactive Tutorial: **How to Create a New Managing Account in AIM**

To exit tutorial press ESC on your keyboard